

Intergovernmental Agreement

Affordable Housing Bond Measure Program IGA

Metro Contract No. XXXXX

THIS INTERGOVERNMENTAL AGREEMENT ("Agreement") is between Metro, a metropolitan service district organized under the laws of the State of Oregon and the Metro Charter, located at 600 N.E. Grand Avenue, Portland, Oregon 97232-2736, and Washington County ("Local Implementation Partner" or "LIP"), located at 155 North First Avenue, Hillsboro, OR and is dated effective as of the last day of signature set forth below (the "Effective Date").

RECITALS

A. The electors of Metro approved Ballot Measure 26-199 on November 6, 2018 (the "Bond Measure"), authorizing Metro to issue \$652.8 million in general obligation bonds to fund affordable housing (the "Bonds").

B. On January 31, 2019, the Metro Council adopted Resolution No. 19-4956, which, among other things, provides that Metro will distribute a portion of the proceeds of the Bonds (the "Bond Proceeds") to eligible local government affordable housing implementation partners, and LIP is a participating local government partner eligible to receive Bond Proceeds.

C. The parties desire to enter into this Agreement to provide the terms and conditions under which Metro will provide Bond Proceeds to LIP to implement the Bond Measure goals, requirements, and restrictions set forth in the Work Plan.

AGREEMENT

1. Definitions. In addition to the definitions above, capitalized terms used in this Agreement have the definitions set forth in this Section 1.

1.1. "Administrative Costs" means Capital Costs that are not Direct Project Costs, including general program administrative expenses (e.g. staff support and overhead costs attributable to Bond Measure program implementation), expenses related to community engagement and outreach, and payments to third-party consultants (e.g. realtors, appraisers, surveyors, title insurers, environmental evaluators, designers, and engineers).

1.2. "Administrative Share" means that portion of the Bond Proceeds totaling \$2,303,216.

1.3. “Affordable Housing” means land and improvements for residential units occupied by low-income households making 80% or less of area median income, consistent with the intents and purposes of the Bond Measure.

1.4. “Affordable Housing Project(s)” or “Projects” means Affordable Housing that is developed, built or acquired by LIP using Bond Proceeds, or supported by LIP through grants or loans of Bond Proceeds, burdened by a Restrictive Covenant.

1.5. “Area Median Income” or “AMI” means median gross household income, adjusted for household size, for the Portland, Oregon metropolitan statistical area as established each year by HUD.

1.6. “Capital Costs” means costs of Affordable Housing that are capitalizable under generally acceptable accounting principles (GAAP), which costs include the costs of capital construction, capital improvements or other capital costs, as those terms are defined by the relevant provisions of the Oregon Constitution and Oregon law (including ORS 310.140).

1.7. “Concept Endorsement” is as defined in Section 4.1, below.

1.8. “Conversions” means conversion of existing, occupied market-rate housing units to Affordable Housing units burdened by a Restrictive Covenant.

1.9. “Direct Project Costs” means Capital Costs that are expended for the acquisition, development, or construction of an Affordable Housing Project.

1.10. “Disbursement Request” is as defined in Section 4.3, below.

1.11. “Eligible Share” means that portion of the Bond Proceeds totaling \$113,488,094.

1.12. “Final Approval” is as defined in Section 4.2, below.

1.13. “LIS” means the LIP’s local implementation strategy document adopted by LIP and attached to this Agreement as **Exhibit A**.

1.14. “LIS Annual Progress Report” is as defined in Section 9.1, below.

1.15. “New Construction” means development and construction of a new Affordable Housing Project.

1.16. “Oversight Committee” means the Affordable Housing Bond Community Oversight Committee created pursuant to Metro Code Section 2.19.260.

1.17. “Project Funds” means that portion of Eligible Share committed through the Project approval process set forth and distributed in accordance with Section 4.

1.18. “Property Acquisitions” means real property acquisitions by LIP to be used for future development of an Affordable Housing Project.

1.19. “Regional Investment” is as defined in Section 2.2, below.

1.20. “Regional Site Acquisition Program” means the program implemented by Metro to use Bond Proceeds to acquire and develop regionally significant sites for Affordable Housing.

1.21. “Restrictive Covenant” is as defined in Section 5, below.

1.22. “Term” is as defined in Section 11.1, below.

1.23. “Unit Production Targets” means those targets set forth in Section 2.1 below, and include the “Total Unit Target,” the “30% or Below Target,” the “31%-60% Unit Target,” the “61-80% Cap,” and the “Two-Bedroom+ Target,” each as defined in Section 2.1.

1.24. “Unit(s)” means residential units in an Affordable Housing Project.

1.25. “Work Plan” means Metro’s Affordable Housing Bond Measure Program Work Plan adopted by the Metro Council by Resolution 19-4956, as subsequently amended by the Metro Council on October 17, 2019 by Resolution 19-5015.

2. Unit Production Targets

2.1. Unit Production Targets. LIP hereby agrees to adopt and take all necessary and appropriate action to implement the Unit Production Targets set forth below. The parties anticipate the LIP’s Unit Production Targets will be met using a combination of funds, including LIP’s Eligible Share and Metro’s Regional Investment. LIP’s failure to make reasonable progress towards meeting its Unit Production Targets, in accordance with the timeline attached hereto as **Exhibit B**, is grounds for termination of this Agreement by Metro as provided in Section 11, after which Metro shall have no further obligation to distribute the Eligible Share.

2.1.1. Total Unit Target: 814. This is the minimum total number of Units to be built or acquired using LIP’s Eligible Share. Should LIP build or acquire additional units above the Total Unit Target using its Eligible Share, those units may be occupied by households earning anywhere between 0-80% so long as 30% or Below Target and the 31%-60% Unit Target have been satisfied.

2.1.2. 30% or Below Target: 334. This is number of the Total Unit Target that will be restricted to households earning 30% or less of AMI, in accordance with the terms of the Restrictive Covenant.

2.1.3. 31%-60% Unit Target: 399. This is number of the Total Unit Target that will be restricted to households earning 31%-60% of AMI, in accordance with the terms of the Restrictive Covenant.

2.1.4. 61-80% Cap: 81. This is the maximum number of units contributing to the Total Unit Target that may be restricted to households earning 61-80% of AMI.

2.1.5. Two-Bedroom+ Target: 407. This is number of the Total Unit Target that will be two bedrooms or more.

2.2. Impact of Regional Program. Metro will use ten percent of the total Bond Proceeds to fund and operate its Regional Site Acquisition Program. The parties expect that Metro's Site Acquisition Program will spend approximately \$12,940,615 within LIP's jurisdictional boundary (the "Regional Investment"). Units created in projects that utilize Regional Investment will contribute towards LIP's Unit Production Targets, unless otherwise agreed to by the parties. Metro will make good faith efforts to coordinate and consult with LIP to ensure Metro's decisions regarding the Regional Investment support LIP in reaching its Unit Production Targets. Once LIP has spent or has committed to spend 75% of its Eligible Share, if Metro has not yet spent, or committed to spend, the Regional Investment, then the parties will meet to discuss potential alternative options for how the Regional Investment could be spent by Metro to support LIP's remaining Unit Production Targets. If following such meeting the parties are still unable to identify opportunities for collaboration or agreeable potential alternative options, then LIP's Unit Production Targets will be reduced by the lesser of (a) ten percent or (b) the proportionate share equal to the amount of Regional Investment Metro has not yet spent.

3. Local Implementation Partner's Eligible Share.

3.1. Direct Project Costs; Consistency with LIS. Subject to the terms and conditions of this Agreement, including Section 4, below, and the requirements, limits, and restrictions set forth in both the Work Plan and the Bond Measure, Metro will provide to LIP the Eligible Share on a Project-by-Project basis. LIP may only spend the Eligible Share on Direct Project Costs that are consistent with its LIS, as determined by Metro, in Metro's reasonable discretion, and will spend no portion of the Eligible Share on Administrative Costs.

3.2. Public or Private Ownership. LIP may use its Eligible Share to support the creation of Affordable Housing that is either privately or publicly owned. The Eligible Share may be contributed to privately-owned Projects in the form of loans or grants on terms approved by LIP. The identification and selection of a Project will be at the discretion of LIP, provided, however, all Project selections must comply with the LIS and contribute towards the Unit Production Targets. Publicly-owned Affordable Housing financed with the LIP's Eligible

Share must contribute to the Unit production Targets and must comply with the LIS and the terms and conditions of this Agreement, including, without limitation, the same Project approval process and requirements provided for in Section 4 below.

3.3. Approved Project Types. LIP may use its Eligible Share only for the types of projects described in the Work Plan. As of the Effective Date, the Work Plan sets forth the following approved types of Affordable Housing Projects: (a) New Construction, (b) Conversions, and (c) Property Acquisitions.

4. Metro Approval Process; Disbursement of Funds; Repayment

4.1. Concept Endorsement. In order for LIP to receive a disbursement of its Eligible Share to fund a New Construction or Conversion Project, LIP must receive an initial funding commitment for such Project (the “Concept Endorsement”) from Metro. LIP’s request for a Concept Endorsement must include general project information, including a project narrative, preliminary sources and uses information, a draft project site plan, copies of relevant due diligence documents, and any other information Metro deems reasonably necessary to issue a Concept Endorsement. Metro will issue the Concept Endorsement to LIP upon Metro’s determination that (a) the Project will reasonably contribute to the Unit Production Targets relative to the amount of the Eligible Share LIP proposes to use for the Project; and (b) the Project will be consistent with the LIS, the Work Plan and the Bond Measure.

4.2. Final Approval. In order for LIP to use its Eligible Share for an Affordable Housing Project, LIP must have received final approval from Metro, as described in this section (“Final Approval”). Metro will issue Final Approval to LIP upon Metro’s determination that (a) the proposed Project reasonably contributes to the Unit Production Targets relative to the amount of the Eligible Share proposed to be used for the Project; and (b) the Project is consistent with the LIS, the Work Plan, and the Bond Measure. LIP’s request for Final Approval will include the Project information described above in Section 4.1, as well as any additional information Metro reasonably requests related to the finalized development program, including design development drawings and an updated sources and uses budget. If after receiving Final Approval, the amount of the Eligible Share initially proposed and approved increases or the Project’s unit count, bedroom mix, or affordability level changes, then LIP must submit an amended request for Final Approval for the Project. Metro will review such an amended request (along with any related Disbursement Request) expeditiously, making best efforts to accommodate LIP’s anticipated Project closing timeline.

4.3. Disbursement. Following Metro's Final Approval of LIP's proposed use of its Eligible Share for an Affordable Housing Project, LIP may request disbursement of the Project Funds from Metro ("Disbursement Request"). Such request will be made in writing (a) no more than 45 days and (b) no less than 10 business days prior to any anticipated closing or need for use. The Disbursement Request will include: (a) a certification from LIP to Metro that the Project information LIP provided to Metro in connection with its request for Final Approval has not changed or been modified in any material way; (b) a completed draft of the proposed Restrictive Covenant that LIP intends to record against the Project in accordance with Section 5 below, (c) a list of finalized sources and uses, (d) a final construction contract schedule of values, if applicable, and (e) wiring instructions or other instructions related to the transmittal of funds. LIP will provide to Metro any other information as Metro may reasonably request related to the Project. Metro will review Disbursement Requests expeditiously and will disburse funds within 10 business days of receiving a completed Disbursement Request.

4.4. Project Failure and Repayment. LIP will use the Project Funds strictly in accordance with the manner and method described in the Final Approval. If the Project financing transaction for which disbursement was sought fails to close within sixty (60) days after Metro disburses the requested funds, then, unless otherwise directed in writing by Metro, LIP will immediately repay to Metro the amount of its Eligible Share disbursed for the Project, including any interest earned thereon. If LIP uses Project Funds for a Property Acquisition, and is thereafter unable to make substantial progress, as reasonably determined by Metro, towards the development of Affordable Housing on the property within four (4) years following the closing date of the Property Acquisition (or such other time period agreed to in writing by Metro), LIP will repay to Metro the amount of the Eligible Share disbursed for the Property Acquisition. LIP acknowledges and expressly affirms its repayment obligations set forth in this section even if such failure is through no fault of LIP. LIP's remaining Eligible Share will be adjusted and increased to reflect such repayment.

5. Affordable Housing Restrictive Covenant.

5.1. General Provisions and Recording Obligations. For all Projects that receive Bond Proceeds, LIP will ensure an affordable housing restrictive covenant (a "Restrictive Covenant") is recorded on the title to the land that comprises the Project. The Restrictive Covenant must be recorded at closing, or upon LIP's contribution of the Bond Proceeds to a Project. LIP will provide Metro a copy of the recorded Restrictive Covenant within ten (10) business days following its recording. If for any reason LIP fails to record a Restrictive Covenant

in accordance with this section, Metro may, at its sole option and upon written notice to LIP, terminate this Agreement in accordance with Section 11, in which case LIP will refund Metro the Bond Proceeds disbursed to LIP for such Project.

5.2. Form for Property Acquisitions. For Property Acquisitions, the Restrictive Covenant will be granted to Metro directly, be recorded in such priority approved by Metro, and shall be substantially in the form attached hereto as **Exhibit C**, or as otherwise approved by Metro.

5.3. Form for New Construction and Conversion Projects. For New Construction Projects and Conversion Projects, the Restrictive Covenant will (a) acknowledge the use of Bond Measure funds, (b) include applicable long-term affordability restrictions, (c) burden the property for a minimum duration of sixty (60) years or thirty (30) years for Conversion Projects where the building is more than ten (10) years old, (d) provide monitoring and access rights to LIP and Metro, (e) name Metro as a third-party beneficiary and (f) unless otherwise agreed to in writing by Metro, be recorded in a priority position only subject to and subordinate to a primary first mortgage or deed of trust and State low-income housing regulatory agreements. The monitoring, access and third party beneficiary language will be subject to Metro's review and approval during the Final Approval process. LIP acknowledges that such language will require Projects to provide to Metro certain data (including financial reports, physical inspection reports, and tenant data) typically collected and prepared by Oregon Housing and Community Services. Metro acknowledges that the Restrictive Covenant may provide for a waiver or temporary relief from the limitations on qualifying income, in order to address incomes rising in place to avoid undue hardship or displacement, or to conform to other regulatory or policy requirements.

6. Project Information Reports; Funding Recognition

6.1. Project Information and Updates. Upon Metro's disbursement of Eligible Share for any particular Project, LIP will provide Metro with regular updates regarding Project construction and completion. LIP will notify Metro of any events during construction that materially affect the Project, including (a) significant extensions of the Project schedule, (b) significant increases to the Project budget, (c) any notices of default issued by LIP or other Project lenders, or (d) any other changes that impact the quality or nature of the Project described in the Final Approval process. If any such material events occur during Project construction, LIP will provide Metro with any additional information Metro reasonably requests related to such events. In addition to providing the general Project updates and information

described above, LIP will provide Metro with the documents listed on the attached **Exhibit D** at the Project milestones referenced therein.

6.2. Funding Recognition. LIP will publicly recognize Metro and the Bond Measure in any publications, media presentations, or other presentations relating to or describing Projects receiving Bond Proceeds. LIP will coordinate with Metro in selecting the date and time for any event recognizing, celebrating or commemorating any Project ground-breaking, completion, ribbon cutting or opening, and provide Metro an opportunity to participate. LIP will ensure that the Bond Measure is officially recognized as a funding source at any such event, and will provide a speaking opportunity for the Metro elected official representing the district in which the Project is located, if such opportunities are provided to LIP or other public officials.

7. Administrative Funding. Subject to the terms and conditions of this Agreement, and the requirements and restrictions set forth in both the Work Plan and the Bond Measure, Metro will provide LIP the Administrative Share. Within thirty (30) days of the Effective Date, Metro will disburse to LIP its Administrative Share in accordance with the schedule set forth on Exhibit B attached to this Agreement. Interest earnings on the Administrative Share while held by LIP may be retained by LIP, provided such interest is used for affordable housing, residential services, or supportive services for residents of affordable housing. Metro's obligation to distribute the Administrative Share is conditioned on LIP making reasonable progress towards its Unit Production Targets, as reasonably determined by Metro in accordance with the timeline set forth on the attached Exhibit B.

8. General Obligation Bonds. All Bond Proceeds disbursed to LIP pursuant to this Agreement (including both the Eligible Share and the Administrative Share) are derived from the sale of voter-approved general obligation bonds that are to be repaid using ad valorem property taxes exempt from the limitations of Article XI, sections 11 and 11b of the Oregon Constitution. LIP covenants and agrees that it will take no actions that would adversely affect the validity of the Bonds or cause Metro not to be able to levy and collect the real property taxes imposed to repay these bonds, which are exempt from Oregon's constitutional property tax limitations. LIP further covenants and agrees that (a) all Bond Proceeds disbursed hereunder will be used only to pay for or reimburse costs that are of a type that are properly chargeable to a Capital Costs (or would be so chargeable with a proper election) to comply with the Oregon Constitution and other applicable laws with respect to the permitted expenditure of general obligation bond proceeds; and (b) within ten (10) days of the event, LIP

will disclose to Metro any events that are required to be included in Metro's continuing disclosure obligations as the issuer of the general obligation bonds. If LIP breaches the foregoing covenants, LIP will immediately undertake whatever remedies or other action may be necessary to cure the default and to compensate Metro for any loss it may suffer as a result thereof, including, without limitation, repayment to Metro of Project Funds.

9. LIP Required Annual Reporting

9.1. Local Implementation Strategy Progress Reports. By the end of each calendar year of the Term, or until LIP has fully expended its Eligible Share, LIP will provide a report to Metro summarizing its LIS progress and outcomes (the "LIS Annual Progress Report"). LIP will create the LIS Annual Progress Report using a template provided by Metro, which template Metro will develop with input from all participating local government partners receiving Bond Proceeds. The Oversight Committee will review the LIS Annual Progress Report and may recommend changes to the LIS to achieve the Unit Production Targets and to better align the LIS with the Work Plan. LIP agrees to participate fully in such annual review process; provided, however, the LIS may be revised or amended only upon written agreement by both LIP and Metro. Failure by LIP to agree to a proposed amendment will not constitute an event of default.

9.2. Financial Eligible Share Reports. Beginning with Metro's first disbursement of any portion of the Eligible Share to LIP for a Project, and continuing each year thereafter, on or before September 15 of each year during the Term until Unit Targets are completed and/or all Eligible Share is disbursed, LIP will provide an annual financial report to Metro containing (a) an itemized list of LIP's expenditure of Project Funds (and interest earnings thereon) through the end of the applicable fiscal year and (b) a certification from LIP to Metro that the Eligible Share was used only to pay for or Capital Costs.

9.3. Administrative Share Reports. On or before September 15 of each year during the Term, LIP will provide an annual report to Metro containing (a) an itemized list of LIP's expenditure of its Administrative Share (and any investment earnings thereon) through the end of the prior fiscal year detailing each entity LIP paid any portion of the Administrative Share and (b) a certification from LIP to Metro that the Administrative Share was used only to pay for or Capital Costs.

10. Audits, Inspections and Retention of Records. LIP will keep proper books of account and records on all activities associated with the expenditure of all funds disbursed by Metro under this Agreement. LIP will maintain these books of account and records in accordance with generally

accepted accounting principles through the date that is three (3) years after the anticipated maturity date of the Bonds or the anticipated maturity date of any obligations issued by Metro to refund the Bonds. Metro expects the Bonds will be outstanding until approximately May of 2039. LIP will permit Metro and its duly authorized representatives, upon prior written notice, to inspect books and records, properties, all work done, labor performed and materials furnished during normal business hours, and to review and make excerpts and transcripts of its books of account and records with respect to the receipt and disbursement of Bond Proceeds received from Metro. Access to these books of account and records is not limited to the required retention period. Metro's authorized representatives will have access to records upon reasonable notice at any reasonable time for as long as the records are maintained.

11. Term; Termination; Default Remedies; Dispute Resolution

11.1. The term of this Agreement commences on the Effective Date and terminates on ten years after the Effective Date (the "Term"). The expectation of the parties is that LIP will spend its Eligible Share within seven (7) years after the Effective Date and that all Projects will be completed within the Term of this Agreement. Metro will have no obligation to disburse any remaining portion of LIP's Eligible Share or Administrative Share after the expiration of the Term. The repayment obligations and indemnities set forth in Sections 4, 5, 8 and 14 survive the expiration or earlier termination of this Agreement.

11.2. Metro and LIP may jointly terminate all or part of this Agreement based upon a determination that such action is in the public interest. Termination under this provision will be effective only upon the mutual, written termination agreement signed by both Metro and LIP.

11.3. If Metro reasonably believes LIP is not spending its Eligible Share according to the terms herein or otherwise has otherwise failed to comply with the terms of this Agreement, in addition to any other rights and remedies set forth herein or available at law, or in equity, Metro has the right to immediately withhold or suspend future distributions of Eligible Share and Administrative Share. In such an event Metro will provide LIP with written notice of such determination and will thereafter proceed with the dispute resolution provisions set forth below in Section 11.4.

11.4. Metro and LIP will negotiate in good faith to resolve any dispute arising out of this Agreement. Subject to the provisions set forth below, Metro or LIP may terminate this Agreement during the term if it reasonably determines the other party has failed to comply with any material provision of this Agreement and is therefore in default. Before terminating this Agreement in accordance with this section, the terminating party will provide the other party with

written notice that describes the evidence of default and include a description of the steps needed to cure the default. From the date that such notice of default is received, the defaulting party will have 30 days to cure the default. If the default is of such a nature that it cannot reasonably be cured within 30 days, the defaulting party will have such additional time as required to cure the default, as long as it is acting in a reasonable manner and in good faith to cure the default. If the parties are unable to resolve any dispute within thirty (30) days of after receipt of a written notice of default or such additional time as may be needed to reasonably cure the default, the parties will attempt to settle any dispute through mediation. The parties shall attempt to agree on a single mediator. The cost of mediation will be shared equally. If the parties agree on a mediator, the mediation must be held within sixty (60) days of selection of the mediator unless the parties otherwise agree. If the parties cannot agree on a mediator, or the matter is not settled during mediation, the parties will have all other remedies available at law or in equity.

12. Notices and Parties' Representatives

12.1. Any notices permitted or required by this Agreement will be addressed to the other party's representative(s) designated in this section and will be deemed provided (a) on the date they are personally delivered, (b) on the date they are sent via electronic communication, or (c) on the third day after they are deposited in the United States mail, postage fully prepaid, by certified mail return receipt requested. Either party may change its representative(s) and the contact information for its representative(s) by providing notice in compliance with this.

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13. Compliance with Law

13.1. LIP will comply with all applicable federal, state, and local laws, regulations, executive orders and ordinances applicable to its investment and expenditure of the Bond Proceeds.

13.2. LIP further recognizes that investing Bond Proceeds (through either a loan or grant) could result in a Project being a “public works” for purposes of Oregon’s prevailing wage rate law, ORS 279C.800 to 279C.870, as it may be amended from time to time. LIP will be solely responsible for ensuring that all Projects receiving Bond Proceeds comply with prevailing wage rate law, as applicable.

13.3. No recipient or proposed recipient of any services or other assistance under the provisions of this Agreement or any program related to this Agreement may be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity funded in whole or in part with the funds made available through this Agreement on the grounds of race, color, or national origin, 42 U.S.C. §2000d (Title VI), or on the grounds of religion, sex, ancestry, age, or disability as that term is defined in the Americans with Disabilities Act. For purposes of this section, “program or activity” is defined as any function conducted by an identifiable administrative unit of LIP receiving funds pursuant to this Agreement.

14. Insurance; Indemnification; Limitation on Liability

14.1. Metro and LIP will self-insure or maintain general liability insurance and workers compensation insurance coverage. Each party is responsible for the wages and benefits of its respective employees performing any work or services related to this Agreement. LIP will add Metro as an additional insured to all commercial general, excess and umbrella liability policies. LIP will provide a certificate of insurance listing Metro as a certificate holder within thirty (30) days of execution of this Agreement.

14.2. Subject to the limitations and conditions of the Oregon Constitution and the Oregon Tort Claims Act, LIP will indemnify, defend, and hold harmless Metro, its elected officers and employees, from and against any and all liabilities, claims, demands, damages, actions, costs, penalties, losses and expenses (including any attorney’s fees in defense of Metro or any attorney’s fees incurred in enforcing this provision) suffered or incurred as a result of third-party claims arising out of LIP’s performance of this Agreement or resulting in whole or in part from any act, omission, negligence, fault or violation of law by LIP, its officers, employees, agents, and contractors. This indemnity includes any third-party claims related to the development, construction, operation, repair, or maintenance of Affordable Housing Projects. This indemnity provision does not apply to third-party claims resulting from the sole negligence or willful misconduct of Metro.

14.3. In no event will either party be liable to the other for, and each party releases the other from, any liability for special, punitive, exemplary, consequential, incidental or indirect losses

or damages (in tort, contract or otherwise) under or in respect of this Agreement, however caused, whether or not arising from a party's sole, joint or concurrent negligence.

15. Oregon Law, Dispute Resolution, and Forum. This Agreement is to be construed according to the laws of the State of Oregon. Any litigation between Metro and LIP arising under this Agreement will occur, if in the state courts, in the Multnomah County Circuit Court, and if in the Federal courts, in the United States District Court for the District of Oregon located in Portland, Oregon.

16. No Third Party Beneficiaries. LIP and Metro are the only parties to this Agreement and are the only parties entitled to enforce its terms and the sole beneficiaries hereof. Nothing in this Agreement gives, is intended to give, or will be construed to give or provide any benefit or right, whether directly, indirectly, or otherwise, to third persons any greater than the right and benefits enjoyed by the general public.

17. Relationship of Parties. Nothing in this Agreement nor any acts of the parties hereunder will be deemed or construed by the parties, or by any third person, to create the relationship of principal and agent, or of partnership, or of joint venture or any association between any LIP and Metro. Furthermore, Metro will not be considered the owner, contractor or the developer of any Project funded with Bond Proceeds. This Agreement is not intended to be a contract that provides for the development or construction of any Project, either directly with a construction contractor or through a developer. Metro specifically waives any provision contained in this Agreement, to the extent it is construed to provide Metro the right to manage, direct or control the developer, general contractor or the subcontractors. The rights and duties of the developer, the general contractor and the subcontractors are the subject of a separate contract or contracts with LIP to which Metro is not a party. LIP waives and releases Metro from any claims and actions related to the construction, operation, repair, or maintenance of any Affordable Housing Projects. If LIP obtains an indemnification agreement from any third-party developer or general contractor receiving Bond Proceeds under this Agreement, LIP will contractually require such party to indemnify Metro to the same extent as LIP.

18. Assignment; Merger; Entire Agreement. This Agreement is binding on each party, its successors, assigns, and legal representatives and may not, under any circumstance, be assigned or transferred by LIP without Metro's written consent. This Agreement and attached

exhibit(s) constitute the entire agreement between the parties on the subject matter hereof. There are no understandings, agreements, or representations, oral or written, not specified herein regarding this Agreement. The failure to enforce any provision of this Agreement does not constitute a waiver by Metro of that or any other provision. No waiver, consent, modification or change of terms of this Agreement will bind either party unless it is in writing and signed by both parties and all necessary approvals have been obtained. Such waiver, consent, modification or change, if made, will be effective only in the specific instance and for the specific purpose given. The failure of a party to enforce any provision of this Agreement will not constitute a waiver by that party of that provision, or of any other provision.

19. Further Assurances. Each of the parties will execute and deliver any and all additional papers, documents, and other assurances, and will do any and all acts and things reasonably necessary in connection with the performance of their obligations hereunder and to carry out the intent and agreements of the parties hereto.

20. Counterparts. This Agreement may be executed in any number of counterparts, each of which will be an original, but all of which will constitute one and the same instrument.

21. No Attorney Fees. Except as otherwise set forth in Section 14 of this Agreement, in the event any arbitration, action or proceeding, including any bankruptcy proceeding, is instituted to enforce any term of this Agreement, each party shall be responsible for its own attorneys' fees and expenses.

22. Debt Limitation. This Agreement is expressly subject to the limitations of the Oregon Constitution and Oregon Tort Claims Act, and is contingent upon appropriation of funds. Any provisions herein that conflict with the above referenced laws are deemed inoperative to that extent.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the Effective Date.

Metro

Washington County

By: _____

By: _____

Name: _____

Name: _____

Title: _____

Title: _____

Date: _____

Date: _____

**Metro Affordable Housing Bond Program
Washington County Local Implementation Strategy
6/25/2019**



Washington County Local Implementation Strategy

June 25th, 2019

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I. Introduction

The Metro Affordable Housing Bond Program is a landmark funding source for affordable housing in the tri-county region. This Local Implementation Strategy guides the efforts of Washington County to create permanent affordable housing using the Metro Affordable Housing Bond Program. Housing primarily developed will be regulated affordable rental housing units, as well as regulated affordable home ownership units. County departments engaged in the implementation of the bond include: Housing Services, Finance, Land Use and Transportation, Facilities, Community Development, and the County Administrative Office. Additionally, county staff will be working closely with cities located in Washington County to create affordable housing throughout its jurisdiction.

Policy leadership for the implementation of the Metro Affordable Housing Bond Program will be guided by the Washington County Board of Commissioners. Also, as part of the review of bond funded housing development projects, the Housing Authority of Washington County (HAWC) will also have an important role in implementation of the bond program. The HAWC is governed by a seven-member Housing Authority Board of Directors (HABOD), which is comprised of the five-member Washington County Board of Commissioners, one community member and one public housing resident. The Housing Advisory Committee (HAC) advises the HABOD and 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 residents.

As stated in Washington County's Strategic Plan 2020, **the Washington County Community – Our Vision** is to be a model *community for 21st century America, reflecting the best of our community's resources, achievements, diversity, values, and pioneering spirit. Washington County is a special community that deserves the best of our individual and collective efforts. Maintaining the quality of life in this community will require the planning, creativity, and action of all – across the divide of sectors and organizations. The fulfillment of our community vision will require governments, business, nonprofits, religious and civic organizations to align passion and resources to serve our community and citizens. The challenge is two-fold: 1) maintain the quality and effectiveness of existing mission-driven organizations and institutions; and 2) link together these vast resources to serve, protect, and reinforce the attributes of a safe, healthy, and vibrant community.*

For our part, we envision a “collaborative community” that recognizes the role, contribution, responsibility and interdependence of citizens and institutions, a community in which:

- *The diversity of our residents is celebrated.*
- *Our children and families have access to the resources and support to reach their full potential.*
- *Our housing is safe, comfortable and diverse, spanning the spectrum of affordability, effectively exploiting the benefits of proximity to work, school, services, and transportation.*
- *Our educational system provides a consistent level of excellence from preschool through graduate-level higher education, and residents have life-long access to a variety of educational opportunities.*
- *Our nonprofit institutions are known for their strength and dedication to the needs of their constituents, working in concert with government, business, and religious partners.*
- *Our residents and visitors are safe, and our justice system is coordinated, balanced, efficient, and responsive.*

- *Our abundant natural resources are nurtured for their inherent beauty, and their contribution to the health and well-being of our residents now, and for generations to come.*
- *Our environment and neighborhood livability are maintained, enhanced, and balanced with our community's growth and development.*
- *Our community recognizes the social, economic, and environmental factors that contribute to the health and well-being of citizens and works together to prevent illness, disease, and injury.*
- *Our economy is known for its diversity, future orientation, vitality, and commitment to the local community.*
- *Our private and public institutions work together to identify and problem-solve critical community issues.*

Autonomy & Collaboration within Washington County

Three jurisdictions in Washington County will be directly responsible for implementation of the Metro Affordable Housing Bond Program —Washington County, the City of Hillsboro and the City of Beaverton. Each jurisdiction will receive an allocation of bond resources based on the share of bond revenue generated by each jurisdiction as outlined in each jurisdiction's Intergovernmental Agreement (IGA) with Metro. Each implementing jurisdiction is responsible for developing its own Local Implementation Strategy, and will have autonomy in project selection, commitment of bond resources, and oversight of bond funded projects. The jurisdictions may choose to collaborate on specific projects that will serve their individual as well as collective community needs.

Recognizing that many community partners serve the larger Washington County area, and that many community members perceive that their needs could be met without respect to jurisdictional boundaries, the three implementing jurisdictions will collaborate on community engagement efforts and on developing the partnerships to ensure the success of all bond projects in Washington County.

In addition to working closely with the implementing jurisdictions of Hillsboro and Beaverton, Washington County will also work in conjunction with other cities located in the county and within Metro's jurisdictional boundary including Cornelius, Forest Grove, Tigard, King City, Tualatin, Sherwood and Durham. Washington County's implementation area also encompasses significant unincorporated areas of the County including the following communities: Aloha/Reedville, Bethany/North Bethany, Bonny Slope, Cedar Hills, Cedar Mill, Metzger, Raleigh Hills.

Metro Bond Resources and Framework Targets

This Local Implementation Strategy focuses on housing that will be developed in the areas of Washington County inside of the Metro Jurisdictional Area and outside of the cities of Beaverton and Hillsboro. See Appendix A for a map of the area. Bond revenues dedicated to Washington County are approximately **\$116,465,532**. The overall goal is to support the development of at least **814 units of affordable housing** throughout Washington County. These 814 housing units are anticipated to house 2,505 low-income people in the County. These may be newly built units or existing units that are at risk of rapidly rising rents. While many of these units are expected to provide rental housing and affordable homeownership units supported with bond resources.

Median Family Income by Percentage and Households Size for the Portland-Vancouver-Hillsboro, OR-WA Metropolitan Statistical Area

Household Size	30% MFI (annual)	60% MFI (annual)	80% MFI (annual)
1 person	\$ 18,450	\$ 36,960	\$ 49,280
4 people	\$ 26,370	\$ 52,740	\$ 70,320

Source: HUD.gov accessed on 4/24/2019

Median Family Income (MFI) as determined for the Metropolitan Statistical Area is updated by the U.S. Department of Housing and Urban Development. The three MFI bands identified in the chart above are the primary targets to provide varying levels of affordability. To provide context, the minimum wage in the Portland Metropolitan Area will be \$12.50/hour as of July 1, 2019 (Source: Oregon.gov accessed on 5/13/2019). A person working full-time at a minimum wage job earns \$26,000 annually.

Recognizing that our lowest income neighbors have the greatest challenges in securing affordable housing, and consistent with the Metro Bond Framework, Washington County has a goal of developing **334** units that are affordable for households with an income at or below 30% of Median Family Income (MFI). These units may serve people with special needs as well as people who earn low wages or have fixed incomes. At least **124** of these units will be supported with rental assistance provided by HAWC, allowing those units to be targeted for the most fragile households. Washington County will utilize its project-based vouchers in different ways to leverage and support providers who can bring services to the table. The county has also identified a goal of developing 100 units of Permanent Supportive Housing (PSH).

The provision of supportive services is essential to successfully house and stabilize many of our community's most vulnerable populations. To provide critical affordable housing services, Washington County is working with social service agencies and other community partners to link supportive services to the affordable housing to help people recover, achieve stability and thrive.

Much of the current private rental housing market is concentrated on small unit sizes, while the need for rental housing crosses a range of household sizes. This miss-match between need and available units is especially difficult for lower income households. As a result, the Metro Bond Framework has set unit production targets and guiding principles. Half of the units developed under the bond program must include two or more bedrooms. For Washington County, this means that at least **407** units will include two or more bedrooms. Another unit production target is that no more than 10 percent of homes will be provided for households making 61-80% of MFI.

Framework Unit Production Targets for Washington County (excluding Beaverton and Hillsboro)	
Total Housing Units Production Target	814
Target Housing Units with 2 or more bedrooms	407
Target Units for 30% MFI Households	334
Target Units for 31% - 60% MFI Households	399
Target Units for 61% - 80% MFI Households	81

These unit production targets are anticipated to be achieved through a portfolio approach, which will include the development or acquisition of 8-12 multifamily rental housing projects, as well as the potential development of 15-30 single-family homeownership units. Units constructed with Metro Bond funds will be maintained as affordable housing for 60 years, while existing units purchased and rehabilitated with Metro Bond funds will be affordable for a period of 30 years. For additional detail on the county's proposed portfolio, please see Appendix B.

Advancing Racial Equity

Washington County is the most racially diverse county in the state. The Metro Council and Washington County have made advancing racial equity a priority in the implementation of the Affordable Housing Bond Program. Decades of housing policy from the federal to the local level has contributed to disparate outcomes for communities of color in housing. People of color are much more likely to struggle with unaffordable housing, displacement and homelessness. Disparity in housing stability and affordability for persons of color is directly linked with economic disparity, as well as historic and systemic housing injustice through practices such as redlining. The implementation of the Metro Affordable Housing Bond Program provides an opportunity to advance racial equity and to meet the needs of historically marginalized communities.

The efforts and opportunities to address racial equity occur at many points in the implementation of the Affordable Housing Bond Program. The selection of project sites, inclusion of minority-owned contractors and workforce in building housing, formation of culturally specific partnerships for outreach and services, accessible resident selection processes, and ongoing reporting of outcomes all provide opportunities to advance racial equity. The specific implementation strategies to address these issues that Washington County will employ are discussed in the various sections below.

In addition, Washington County, along with the cities of Hillsboro and Beaverton and HAWC, receives federal housing and community development funds from the U.S. Department of Housing and Urban Development (HUD) and is, therefore, required to periodically prepare an Analysis of Impediments to Fair Housing (AI). The last AI was produced jointly with the City of Beaverton in 2012 (Hillsboro began receiving its CDBG funds as a separate allocation in 2018). The new AI will be completed as part of the next Consolidated Plan update, which is underway currently and will be completed in 2020. The AI must "affirmatively further" fair housing according to HUD's *Fair Housing Guide* by:

- Analyzing and eliminating housing discrimination in the jurisdiction
- Promoting fair housing choice for all persons
- Providing opportunities for inclusive housing occupancy patterns
- Promoting housing that is structurally accessible and usable by all people, regardless of ability
- Fostering compliance with the nondiscrimination clauses of the Fair Housing Act

The 2012 AI identified six Fair Housing strategy areas:

1. Awareness, information & training
2. Access to decent and affordable housing
3. Land use and zoning tools to promote access to opportunity
4. Overcoming linguistic and cultural isolation and serving communities of color
5. Overcoming disability-related barriers
6. Data collection and analysis

The above strategies identified in the 2012 AI are incorporated within the LIS.

II. Local Implementation Strategy Development

The development of the Implementation Strategy is based on review of recent studies and planning efforts that have involved diverse community members within Washington County, along with direct community engagement specifically addressing the Metro Affordable Housing Bond Program. Studies and planning efforts reviewed include:

- Metro's 2017 Regional Affordable Housing Inventory Database
- *2015-2020 Washington County Consolidated Plan* (housing needs assessment section)
- The Coalition of Communities of Color report, *Leading with Race* (particularly sections on housing justice)
- Metro-funded Southwest Corridor Equitable Housing project report
- Washington County's Aloha-Reedville and Aloha Tomorrow studies
- Housing need studies prepared for specific jurisdictions within the County, excluding Hillsboro and Beaverton (housing needs assessment section)
- Oregon Housing and Community Services *2019-2023 Statewide Housing Plan* (housing needs assessment section)
- Metro's *Tri-County Equitable Housing Plan*

Information from these studies and reports were used to develop various sections of this strategy. For example, the Metro Regional Affordable Housing Inventory Database is discussed in the Project Selection Process Section. It is important to note that in many ways the input and suggestions received through the County's community engagement process substantiated the findings from the above - mentioned studies and planning efforts.

Community Engagement – Phase I

During the months of February, March, April and May in 2019, the Washington County regional project team, which included staff from the County, Beaverton and Hillsboro, undertook extensive consultation with the community to better understand key issues and suggestions to addressing affordable housing within Washington County. To be most efficient, the project team opted to attend existing community and agency-based meetings to gain as much varied input as possible from a broad range of stakeholders. Every effort was made to approach all community engagement activities through a lens of equity and inclusion with special attention paid to gathering the perspective of historically underrepresented groups. Groups staff heard from included communities of color and individuals with the following lived experiences:

- Low-income
- Seniors
- Youth experiencing housing instability
- Physical disabilities
- Developmental disabilities
- Mental health concerns
- Addictions issues
- Limited English proficiency
- Immigrants and refugees
- Current or previous experience of housing instability
- Residents of low-income housing

- Justice-involved
- Service providers for people on probation and currently incarcerated
- Citizen Participation Organization (CPO) members
- Tribal community
- Veterans

The project team was able to hear from over 300 people including members of affected communities as well as individuals representing over 50 agencies (Appendix C), by attending existing meetings. At each opportunity the team provided a brief overview of the Metro Affordable Housing Bond Program and its impact in Washington County, and a description of the collaborative community engagement conducted between the three jurisdictions (cities of Beaverton and Hillsboro and Washington County). Opportunities also included facilitated discussions to answer the following questions:

- 1) What community-based organizations, service providers, advocacy groups, and communities should we connect with for input about Metro bond implementation strategies?
- 2) What are the things that are most important to you and/or your family when you think about where you want to live?
- 3) What do you think are the biggest challenges people have with keeping their housing?
- 4) What types of services, programs, and/or activities are needed to overcome these challenges?
- 5) What do you think are the biggest challenges people face when trying to find a place to live?
- 6) What is the best way for you to find out about available affordable housing?
- 7) Is there anything else you'd like to share about your experience or the need for housing in your community?

The table below outlines the community engagement opportunities that the project team attended.

Date	Stakeholder Group	Location	Total Participants	Agencies
02/07/2019	Coalition of Housing Advocates	Beaverton	12	11
02/06/2019	Housing Support Services Network	Beaverton	57	42
02/13/2019	Washington County Resident Advisory Board	Hillsboro	20	
03/11/2019	Self Determination Resources	Beaverton	5	1
3/14/2019	SOAR Immigration Legal Services/EMO	Hillsboro	3	1
3/18-3/27	Homeplate Youth Services	(survey)	10	1
3/18/2019	Consolidated Plan Workgroup	Hillsboro	31	17
3/25/2019	Washington County Parole and Probation	Hillsboro	11	2
3/26/2019	Oregon Law Center	(survey)	15	1
3/27/2019	Community Action/CPOs Homeless Forum	Cornelius	43	2
4/4/2019	Community Action – Family Advocates & Housing Specialists	Hillsboro	15	1
4/12/2019	Centro Cultural/DAVS Seniors and Tribal Community	Cornelius	17	1
4/16/2019	Head Start Policy Council (parents)	Hillsboro	23	1
4/15-4/17 2019	Consolidated Plan Focus Groups (6)	Hillsboro	38	0
5/22/2019	Culturally Specific Behavioral Health Providers	Hillsboro	20	8

Learnings from Input Sessions

Input from all the engagement opportunities was compiled, coded and analyzed for key themes related to the following 5 categories:

- Barriers (46% of total)
- Service Needs (24% of total)
- Location (16% of total)
- Marketing (11% of total)
- Other (2% of total)

A summary of detail within each category is below.

Barriers

This category includes a variety of factors that prevent people from being able to secure or maintain housing. Specifically, these responses fell into one of the following categories:

- 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
- Screening Criteria (24%) – rental history; criminal history; credit history; citizenship status; and understanding what purpose screening serves and why it is necessary
- Navigation (12%) – complex system of finding and securing housing; complex application process; ability to understand and follow through with finding and securing housing; bureaucracy is overwhelming; mobility/transient nature of clientele
- Housing Needs (10%) – unit size; accessibility for developmentally delayed people; safety/livability of units; spaces not trauma informed
- Cultural and Trust (8%) – Cultural differences in understanding of norms and compliance; and fear or distrust about stability of housing, neighbors, environment

Service Needs

This category includes factors that are related to specific services that could be offered onsite or ways in which services could better meet the needs of residents. For the most part, responses were categorized as the following:

- 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
- Service Alignment (22%) – coordination between community-based organizations, agencies and other service providers; coordination of services specific to families and seniors;
- Addictions/Mental Health or other Case Management (15%) – onsite mental health and addictions services as well as case management for others who need that level of support
- Other mentions included accommodations within the physical space such as community rooms, common space, and storage space

Location

This category includes specifics about where housing is located, proximity to things people may need to thrive and the environment in which housing is situated. Responses primarily fell into the following groups:

- Services (24%) – proximity to grocery stores, employment, medical providers, and other supportive services
- Safe/Sense of community (45%) – good schools; sense of community; and safe, quiet, walkable neighborhood
- Transit (17%) – close to public transportation; and accessible for special needs transportation (LIFT)
- Other comments included equitable distribution of housing in mixed-income areas with broad geographical dispersal

Marketing

This category was specifically focused on how people hear about housing and considerations in how to share information about housing with communities. This was a much smaller number of comments that 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.

Several significant policies outlined in this Local Implementation Strategy were developed or impacted by feedback received through the county's community engagement work.

Key Feedback Themes	Policy Impact
Barriers	Informed county's threshold project requirement of low-barrier screening criteria. Informed county's use of universal design as a competitive selection criterion.
Service Needs	Informed county's goal of 100 Permanent Supportive Housing (PSH) units.
Location	Informed county's housing development priorities related to projects near major public transportation and transit corridors. Informed county's housing development priority related to projects in high opportunity areas.
Marketing	Informed county's threshold project requirement for affirmative marketing.

During the public comment period of April 23rd through May 28th, 2019 for the first draft of the Local Implementation Strategy, written comments were received through a dedicated email address, and a public hearing was held during the 5/7/2019 Board of Commissioners meeting. Housing Services staff also met with the following councils and committees to receive feedback on this draft document:

- City Councils of Cornelius, Durham, Forest Grove, King City, Tigard, Tualatin, and Sherwood.
- Washington County Planning Commission, CDBG and HOME Policy Advisory Board, Housing Advisory Committee, and the Committee for Community Involvement.

In addition, Housing Services staff 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 project selection criteria. Developers who participated in these two events included:

REACH	Specialized Housing
Community Development Partners	Community Partners for Affordable Housing
BRIDGE Housing	Community Housing Fund
Bienestar	Northwest Housing Alternatives
Cascade Housing Development	Sequoia Mental Health
Community Action	Buono Properties
CASA of Oregon	Innovative Housing, Inc.
DBG Properties LLC	Proud Ground
Habitat for Humanity – Metro West	

Detailed feedback from the forum and conference call, as well as from all community engagement work to date are included in Appendix C: Community Engagement Results. Staff were successful in reaching a broad range of communities of color and other historically underrepresented groups in a short timeframe. The community engagement process will continue to inform the implementation of the Metro Affordable Housing Bond Program.

III. Implementation Phase

Implementation of Metro Affordable Housing Bond Program is expected to occur over a period of five to seven years. During this period staff will identify sites, secure needed resources for capital and services, develop partnerships with developers and service providers, and construct housing.

During this period, it is expected that community needs, and opportunities may change. New census data will become available, new community planning efforts will be initiated or completed (e.g. development of Washington County's 2020-2024 Consolidated Plan), and new resources or opportunities may become available while other resources or opportunities may not materialize as anticipated. In addition, certain framework goals may be easily fulfilled while others may prove more challenging. Because of the dynamic nature of this work, Washington County proposes to periodically review, and potentially reset, this Implementation Strategy.

Washington County will review the Implementation Strategy at a minimum of twice during the implementation phase. The first review will occur 18-24 months following the initial roll-out of bond funds. The second review will occur 48-60 months following initial roll-out of funds. Should these reviews result in modifications to the Implementation Strategy, the review process will include community outreach and engagement including to cities or other jurisdictions that may be impacted, review and amendment by the Washington County Board of Commissioners, and submission to Metro's Community Oversight Committee for review and recommendation for approval to Metro Council.

IV. Project Selection

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 selecting projects through regular Notices of Funding Availability (NOFAs) and with targeted Request for Proposals (RFP). To also be responsive to time-sensitive opportunities for acquisition of Low-Cost Market Rental (LCMR) properties, also referred to as 'naturally occurring affordable housing, Washington County will consider requests for property acquisitions outside of the NOFA timeline. Developers considering LCMR property acquisition should contact Washington County staff at: affordablehousingbond@co.washington.or.us.

Projects using Metro Affordable Housing Bond Program funding will be evaluated by how closely they meet overall targets regarding income levels and unit sizes as defined in the Metro Work Plan. Those projects that provide housing opportunities for the very lowest income, under-served populations, or provide family-sized units, particularly 3- and 4-bedroom units will be given priority. 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-sized units.

Needs

Washington County conducted a housing needs assessment in 2014 as part of the *2015-2020 Washington County Consolidated Plan*. The study identified the need for 14,000-23,000 additional housing units in Washington County for those at <50% MFI (2006-2010 and 2007-2011 Comprehensive Housing Affordability Strategy (CHAS) data. In addition, a housing needs analysis is currently underway for the upcoming *2020-2024 Washington County Consolidated Plan* planning process which will also use the most recent CHAS data from 2011-2015. This CHAS data will be used in the upcoming Consolidated Plan and is included here.

Affordable Housing Need – Washington County			
	<30% MFI	30-50% MFI	Total need <50% MFI
<i>2015-2020 Washington County Consolidated Plan, Housing Needs Analysis</i>	10,000-11,000	4,000-12,000	14,000-23,000
2011-2015 CHAS	12,860	12,880	25,740

As noted earlier in this document, a significant portion of Washington County's implementation area for the Metro Affordable Housing Bond is comprised of unincorporated communities. Because those communities generally do not have statistically recognized boundaries, it is challenging to determine housing need unless there are existing housing needs analyses for a specific community.

Needs information for jurisdictions within Washington County, using the 2011-2015 CHAS data, are shown below:

Affordable Housing Need, <50% AMI or Less			Existing Regulated Affordable Housing
Location	Self-Identified	CHAS data, 2011-2015	
Forest Grove*	~1,400 <i>Housing Needs Assessment and Recommendations, 2017 (written by City of Forest Grove staff, being updated currently)</i>	355	560
Tigard*	1,580 identified just in the Southwest Corridor area of Tigard in <i>The Southwest Equitable Housing Strategy, 2018</i>	2,898	949
Cornelius	-	325	126**
King City	470 <i>Housing Needs Analysis, March 2018 (Eco Northwest)</i>	65	0
Tualatin	-	1,865	604
Sherwood	292 <i>Housing Needs Analysis, December 2017 (Eco Northwest)</i>	390	123
Durham	-	145	210

*Two communities in Washington County, Forest Grove and Tigard, are categorized as rent burdened cities under the Rent Burdened Cities Bill (HB 4006). This legislation requires that cities of more than 10,000 people in which 25% of the residents pay more than 50% of their income towards rent must “hold at least one public meeting to discuss the causes of severe rent burdens and potential solutions...” and “requires these cities to complete and submit a survey to the Department of Land Conservation and Development (DLCD) and Oregon Housing and Community Services (OHCS) annually, reporting the number of permitted and produced residential units in several different categories.” DLCD technical assistance funds have been allocated to selected communities to support new or updated housing needs analyses, code analysis, code audit, or housing strategy implementation plans. DLCD supported work must be completed by June 2019.

**81 units in Metro Database + 45 units at Cornelius Place (completed in 2019) = 126 total affordable housing units in Cornelius

Evaluation of Development Projects using Metro Affordable Housing Bond Funding

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. While all these factors are important, they are not listed in priority order below.

A. Jurisdictional and Area Partnerships and Geographic Dispersal. Jurisdictional and area partners involved in increasing the number of affordable housing units and who can also provide financial assistance (e.g. SDC/fee waivers or exemptions, density bonuses, property tax waivers, and other financial support), will be better positioned to attract developers due to the high cost of land and construction. However, Washington County will also encourage funding to be dispersed throughout the implementation area.

B. Housing Needs Data and Census Tract Analysis. As stated above, housing needs data will be used to locate affordable housing developments. Information regarding where affordable housing currently exists (from the 2017 Metro Regional Affordable Housing Inventory Database) will be used, as well as, GIS identification of language predominantly spoken at home, areas of concentration of low-income households, communities of color and people with disabilities to help identify development opportunities for new affordable housing units.

C. Land Availability and Cost. Because the availability of land and the cost of land can be an impediment to the development of affordable housing, potential developments that have site control will be highly evaluated. Appropriately zoned land offered at a fair market price will also be highly evaluated. However, when land is proposed to be donated, has the appropriate zoning and does not have any impediments regarding location (e.g. concentration of affordable housing, not near transportation or potential employment hub), this kind of opportunity will be positively evaluated.

D. Local Development Partners. The County will work in partnership with developers and owners who have prior experience in developing affordable housing including local for-profit and non-profit developers, including organizations designated as Community Development Housing Organizations (CHDOs). They must have a demonstrated track record of successfully developing affordable housing within the Portland metro area or be a local organization which have a proven track record providing resident services and are community-based. In addition, HAWC intends to be a developer or owner of housing funded under the Metro Regional Affordable Housing Bond Program.

E. Major Public Transportation and Transit Corridors. Areas within a quarter-mile of MAX or high-frequency bus lines as identified by GIS mapping will be given priority. This also includes areas with sidewalk connections to facilitate accessible use of transit.

F. High Opportunity Areas. High Opportunity Areas include sites located near transit (as defined above), jobs, high-performing schools, commercial services, parks and open space, and basic needs services.

G. Areas Identified by HUD (U.S. Housing and Urban Development) as Qualified Census Tracts (QCTs) and Small Area Difficult to Develop Areas (SADDAs). QCTs and SADDAs are areas where HUD has incentivized development of affordable housing; they allow for projects built in those areas to receive a 30% 'boost' in Low Income Housing Tax Credits (LIHTCs) that can be leveraged with Metro Affordable Housing Bond Program funds. These areas will be identified by GIS mapping.

Threshold Project Requirements

The implementation of the Metro Affordable Housing Bond Program provides an opportunity to address the needs of historically marginalized communities. 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. These requirements include:

A. M/W/DBE/ESB Contracting. Consistent with prior affordable housing development projects in the county, bond project sponsors will make good faith efforts to achieve 20% subcontracting participation on the development hard and soft costs to COBID certified MWESBs. Specific NOFAs or RFPs may have additional goals or requirements. Project sponsors will be required to provide documentation of contracting efforts and results. Currently, Washington County is studying its procurement process as a part of its equity, diversity and inclusion initiative. The 20% aspirational goal may be adjusted as Washington County completes the development of a corporate plan for purchasing, contracting, and monitoring through its internal equity, diversity and inclusion work. This aspirational goal will be reviewed while the LIS is being reviewed as mentioned in the Implementation Phase section of this document.

B. Affirmative Marketing, Tenant Selection and Lease-Up. Consistent with Metro policy, Washington County will work to ensure that Metro Affordable Housing Bond Program-financed housing serves communities of color, families with children and/or multiple generations, people living with disabilities, seniors, veterans, households experiencing or at risk of homelessness, and households at risk of displacement. Washington County will require that project developers and/or owners make best faith efforts to units available to minorities and disadvantaged populations using best practice marketing strategies. In general, this will require:

- i. Affirmative outreach and marketing to target populations. Developers and/or owners, and their property management companies (if applicable) will be expected to engage in proactive efforts to make disadvantaged populations aware of the availability of units, and the process and timeline for application. Washington County 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.
- ii. Washington County 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 resident 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.
- iii. HAWC will use the project-based voucher (PBV) RFP process to leverage units increasing the score for projects that commit to low-barrier screening.
- iv. Washington County will, in part, be guided by the County's Housing Choice Voucher Administrative Plan screening criteria guidelines. As stated in the Washington County Department of Housing Services – Housing Choice Voucher Program Administrative Plan (pages 81-82), as examples of some guidelines, HAWC will consider the following facts and circumstances:

- The seriousness of the case, especially with respect to how it would affect other residents' safety or property.
- The effects that denial of assistance may have on other members of the family who were not involved in the action or failure to act.
- The extent of participation or culpability of individual family members, including whether the culpable family member is a minor or a person with disabilities, (as discussed further in Section 3-III.G of the Administrative Plan) or a victim of domestic violence, dating violence, sexual assault, or stalking.
- The length of time since the violation occurred, including the age of the individual at the time of the conduct, as well as the family's recent history and the likelihood of favorable conduct in the future.
- In the case of drug or alcohol abuse, whether the culpable household member is participating in or has successfully completed a supervised drug or alcohol rehabilitation program or has otherwise been habilitated successfully. HAWC will require the applicant to submit evidence of the household member's current participation in or successful completion of a supervised drug or alcohol rehabilitation program, or evidence of otherwise having been rehabilitated successfully.

Competitive Selection Criteria for Projects

- A. **Workforce Participation.** Washington County promotes workforce hiring of minorities, women and disabled veterans. Washington County recognizes the need to maintain and continue support for programs designed to develop adequate numbers of competent workers within the community for the construction industry. The county will work with partners such as WorkSystems and Metro to develop apprenticeship programs within Washington County that will benefit development teams for Metro bond-funded projects. Washington County will also participate in Metro's Construction Careers Pathways Project.
- B. **Permanent Supportive Housing.** Washington County is committed to providing permanent supportive housing to the most vulnerable individuals and families in the community. To address the need for permanent housing in Washington County, the county will 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.
- C. **Commitment to serving communities of color – demonstrated by culturally specific services to facilitate lease-up process as well as ongoing services.** Washington County will use culturally specific techniques such as marketing in appropriate languages, gathering places and use of social services providers. The county will require housing developers and sponsors to use marketing and outreach methods reach communities of color and difficult to house populations.
- D. **Use of universal design principles.** Washington County will increase the number of accessible and visitable housing units for individuals of all ages and abilities. Use of universal design principles that enhance safety and access both at properties and within apartment units (in addition to accessibility requirements outlined in local community development codes) is important to this work. The intention of this criteria is to encourage the integration of design

features that enhance the livability of the units produced in way that does not add substantial cost to a project. Some examples of design features include: reinforcements in all bathrooms to allow for grab bar installation as needed; door handles, safety devices for second or higher windows, cabinet pulls, and light switches that are appropriate for persons with physical limitations; lighting and interior color selection (paint and flooring) that is appropriate for persons with limited vision.

- E. **Metro Bond Funding Set-Aside for Small Non-Profits and Community Housing Development Organizations (CHDOs).** A CHDO is a private nonprofit, community-based, service organization that includes community members on its board and develops housing for the community it serves. For the past 25 years these organizations have developed affordable housing within the county in a way that engages the local communities they serve. These are grassroots organizations and are active and integral to these communities within the county. They also play an important role in reaching difficult-to-house populations and communities of color.

Therefore, 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. This set-aside is intended to provide support for projects developed by these organizations. If the set-aside is fully utilized, these small grassroots organizations are also eligible to request additional bond funds for affordable housing projects. This set-aside will be reviewed at the same time as the local implementation plan is reviewed. If the set-aside has not been utilized or is underutilized, any remaining set-aside funds may be returned to the full pool of bond funds and available for other affordable housing projects. The county is committed to supporting the successful efforts of local nonprofits.

Sites Identified by Washington County

Metro will use a portion of the Affordable Housing Bond Program proceeds to fund and operate its Regional Site Acquisition Program. Additionally, Washington County will explore purchasing sites to develop affordable housing. Washington County will prioritize sites for purchase that assist in reaching implementation strategy goals. The County will take into consideration:

- the beneficial leverage of free or discounted land,
- opportunities to meet community development goals or the development of beneficial service partnerships; and/or
- opportunities to maximize use of 4% Low Income Housing Tax Credit (LIHTC) resources.

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. There may be situations where a developer would be selected outside of the RFP process. Those situations would include projects sponsored by non-profit developers eligible for the set-aside of Metro Bond funds as outlined on page 16-17, and if a site for development was comprised of adjoining parcels – one owned or purchased by the county and the other owned by a developer. In both those

situations the proposed project would need to meet established project selection criteria and make sufficient progress toward the county's unit production targets.

Sites Proposed by Private Non-Profit and For-Profit Developers

Generally, Washington County will issue Notices of Funding Availability (NOFAs) to select projects to be funded by the Metro Affordable Housing Bond Program. Depending on progress toward Metro Affordable Housing Bond Program framework goals, proposals from developers will need to achieve specific targets for income levels, unit types, geographic area, racial equity, or other characteristics. Developer and owners will be required to work closely with Washington County Housing Services Department to ensure that their proposals are in alignment with the Washington County's Implementation Strategy. 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.

Sites Identified by Metro

Metro Affordable Housing Bond Program funds include an allocation for land acquisition by Metro rather than by the implementing jurisdictions. Metro has allocated an estimated \$12.9 million for acquisition in the Washington County Metro Bond implementation area. These funds will primarily be used to purchase sites within the county that further leverage Washington County's allocation of bond funds. Metro Acquisition funds can also be used as a gap funding source for projects developed on a Metro-acquired property and are an important component to the overall successful implementation of the Affordable Housing Bond Program in the county. The county is committed to working closely with Metro to identify appropriate sites for development that meet Metro's implementation strategy for acquisition. The county will also work with local jurisdictions in this process. For sites that are identified within Washington County, a developer and owner will be selected by the county and Metro.

V. Leveraging Other Affordable Housing Resources

The Metro Affordable Housing Bond Program is a landmark funding source for affordable housing in the tri-county region. With the leverage of state, federal and other sources of funding, the Metro Affordable Housing Bond Program provides an opportunity to substantially increase the number of affordable housing units that can be developed within a five- to seven-year period.

The Metro Affordable Housing Bond Program unit production goals are ambitious and, realistically, cannot only be accomplished using Metro Affordable Housing Bond resources alone. A combination of bond funds and both public and private funding sources will likely be required to meet unit production goals. The following principles that will guide Washington County's efforts to leverage bond funds:

- A. **Maximize the use of non-competitive resources.** The 4% Low Income Housing Tax Credit (LIHTC) program is available on a non-competitive basis to provide equity for affordable housing development. This program is especially useful for larger projects or scattered site projects that can be bundled to achieve the scale desired by equity investors. Developing projects in Qualified Census Tracts (QCTs) or Difficult to Develop Areas (DDAs) maximizes the usefulness of the 4% tax credits. The 4% Low Income Housing Tax Credit (LIHTC) program differs from the 9% LIHTC program regarding timing of application and competitiveness. While Metro bond funds can be

leveraged with either LIHTC program, the 4% program is highlighted here because it is non-competitive and available on a rolling basis throughout each year.

- B. **Maximize use of private resources.** Some projects will generate enough rental income to make debt service payments on loans from private banks. While ensuring that projects have appropriate operating budgets and reserves, private debt should be secured for projects whenever feasible. In affordable homeownership units, individual household mortgages will also leverage Metro bond funds.
- C. **Maximize local resources.** A variety of local resources may be available to support capital and operating expenses:
 - i. **Project-based rental assistance.** This assistance will allow residents to pay based on their household income, while the project will receive a set rental income based on the Section 8 payment standard. This is a federal resource administered by HAWC and is subject to requirements outlined in 24 CFR 983. HAWC has set-aside project-based Section 8 assistance for 124 units to Washington County bond-funded projects. Some portion of these project-based Section 8 assistance will be committed to HAWC-owned projects and some will be available to other project sponsors.
 - ii. **Property tax exemption.** This assistance will lessen the overall cost of operating affordable housing developments. HAWC-owned projects are eligible for property tax exemption under the provisions of ORS 307.092(1)(b). Washington County also provides property tax exemption in unincorporated areas for eligible non-profit affordable rental housing under the provisions of ORS 307.540-548. Other jurisdictions providing property tax abatement for eligible affordable housing include the cities of Tigard, Forest Grove, Beaverton, Cornelius (senior properties with a PILOT agreement only), and Hillsboro.
 - iii. **Washington County HOME Partnerships Investment Program funds.** Washington County HOME funds are federal funds administered by the Office of Community Development. \$6,748,771 is estimated to be available for development of rental and/or homeownership units within the County over the next five years. Additionally, there is a 15% HOME set aside for CHDOs to support organizational operations.
 - iv. **Washington County Housing Production Opportunity Fund.** The Housing Production Opportunity Fund (HPOF) is administered by the County Administrative Office and Housing Services Department. It is intended to support affordable housing development projects that encounter a gap in funding after receiving all other funds. In the 2018-2019 fiscal year, HPOF was allocated \$1 million from the Washington County General Fund. The unspent HPOF funds are being rolled into the 2019-2020 fiscal year budget, with a recommended addition of \$4 million to be included in next year's budget.
 - v. **Resources of partner jurisdictions.** The Housing Services Department will work closely with cities and other jurisdictions in their geographic target areas to identify local resources that can be contributed to affordable housing projects. This may include donated or discounted land, fee waivers or exemptions, grants, or other resources. An example of this is the City of Tigard's SDC exemption ordinance.
- D. **Seek other existing affordable housing resources (Federal, State and County resources).** Washington County recognizes that despite the substantial amount of Metro Affordable Housing Bond Program funding and the strong commitment of resources from HAWC and Washington County, projects may have financing gaps that are best filled with other traditional affordable housing program resources. Sources such as the County HOME funds, the 9% Low Income Housing Tax Credit (LIHTC), State Document Recording Fee, Oregon Affordable Housing Tax

Credit (OAHTC), and other funding sources may be needed to complete the financing for specific projects. Often, these resources include a state or region-wide competitive selection processes which can add time to the development schedule of a project. Washington County will also monitor ongoing legislation at the State level that might contribute additional resources for permanent supportive housing capital, rental and service funds. Washington County will work with funders in a transparent way to find the most effective and efficient path to bring these resources to bond-funded affordable housing projects.

- E. **Support the pipeline of other affordable housing projects.** While much of Washington County's efforts during the implementation of the Metro Affordable Housing Bond Program will be focused on moving the pipeline of bond-funded projects forward, the ongoing availability of other Federal and State affordable housing resources means there is a likelihood of other projects moving forward during at the same 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.

VI. Project Selection Criteria

Metro Framework

Washington County will take several factors into consideration in the selection of projects to be funded under the Housing Bond. The first consideration will be how each project contributes to the accomplishment of the Metro Framework, which was approved by voters in November 2018 as a part of Measure 26-199. Under the Framework, Washington County has the following targets:

Framework Unit Production Targets for Washington County (excluding Beaverton and Hillsboro)	
Total Housing Units Production Target	814
Target Housing Units with 2 or more bedrooms	407
Target Units for 30% MFI Households	334
Target Units for 31% - 60% MFI Households	399
Target Units for 61% - 80% MFI Households	81

To achieve these unit production targets Washington County expects that 8-12 affordable housing developments will be developed or rehabilitated. Washington County anticipates achieving these production targets in an overall portfolio of funded projects (Appendix B). It does not expect that each project will reflect the ratios expressed by these targets. This may result in the development of more than 814 to achieve these production targets. The large and diverse geographic area covered by this Implementation Strategy necessitates a variety of housing types and sizes that may differ significantly in development costs.

To achieve the goal of developing 407 family-size units, Washington County expects that most of the development projects will include units that are two bedroom or larger. The ratio of small to large units will be reflected in the target population for specific projects and characteristics of each site in terms of whether it is best suited to families with children or smaller households.

Washington County expects that most projects will include units for residents with incomes of 30% or less of the MFI. Housing units targeted to the very low-income resident may serve low wage earners, people with disabilities or other 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.

Furthering Washington County's Affordable Housing Goals

In addition to fulfilling the Metro Framework, affordable housing developed with the Metro Affordable Housing Bond Program will also support Washington County's Department of Housing Services *2017-2027 Strategic Plan*.

Consistent with this Plan, Washington County:

- Will work to create housing opportunities across the geographic area of this Implementation Strategy. Included in the geographic area are the cities of Cornelius, Durham, Forest Grove, King City, Sherwood, Tigard and Tualatin and the unincorporated areas of Washington County that are within the Metro Jurisdictional Area.
- Will focus its bond funding on new construction of affordable multi-family rental projects.
- Will consider acquisition/rehabilitation projects to prevent displacement.
- Will support the development of homeownership units.

Racial Equity

Based on themes from *Leading With Race* by Coalition of Communities of Color, Washington County's approach to racial equity in project selection will consider factors such as:

- Increasing affordable housing in areas with existing underserved diverse populations, especially in areas that may be part of a redevelopment or urban renewal plan which could cause displacement.
- Providing new affordable housing in high opportunity neighborhoods and sites. These are sites that have good access to transit, jobs, quality schools, commercial services, parks and open space, etc.
- Supporting project teams that provide culturally specific resources and services. Washington County recognizes that culturally specific programs can achieve strong outcomes for diverse groups in the community. Washington County will prioritize 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.

According to the report, *Leading With Race*, disparity in housing stability and affordability for persons of color is directly linked with economic disparity, as well as historic and systemic housing injustice through practices such as redlining. Ongoing community engagement with culturally specific groups throughout the bond implementation period will further inform the project selection criteria.

Connection to Services

Washington 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.

Metro bond funds can only be used for development of housing, not for direct service costs. Projects serving high needs populations will require robust supportive services to ensure resident stability and positive outcomes. 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. Washington County will evaluate a project's target population and service plan to ensure that it is appropriate and sustainable.

Washington County will also look for opportunities to leverage existing services with language in RFPs for project-based vouchers. Providing deeper subsidies to properties in the form of project-based vouchers can allow for the flexibility to help fund some of the important services that may be needed. Washington County will monitor legislation at the State level regarding permanent supportive housing capital, rental subsidy and service dollars. Should funding for permanent supportive housing be offered, Washington County will apply and leverage funds with Metro Affordable Housing Bond Program funds to create deeply affordable housing.

Oregon Housing and Community Services (OHCS) *2019-2023 Statewide Housing Plan* identifies Permanent Supportive Housing (PSH) as a priority. According to that plan,

PSH combines lease-based housing affordable at extremely low incomes (less than 30% of the area median income) with tenancy supports and other wraparound supportive services to more effectively serve the most vulnerable populations, including people who are homeless or at risk of becoming homeless and people who are institutionalized or at risk of institutionalization. Properties providing PSH units offer social, health, and employment services for residents, helping to ensure long-term housing success. PSH is a key resource for people who, without support in their tenancy, may not be as successful in maintaining stable housing and who conversely, without housing, may not be as successful in using health care and other services to achieve and maintain recovery, health and wellness (pg. 24).

Financial support from Metro helped develop the *Tri-County Equitable Housing Strategy to Expand Supportive Housing for People Experiencing Chronic Homelessness*. The Washington County Board of Commissioners received this report at its April 9, 2019 Work Session and expressed interest in implementing this strategy. The strategy provides recommendations to reduce chronic or long-term homelessness for people with complex health conditions through a scaled, blended service and housing system that provides flexible service dollars and ensures a stable, long-term stock of supportive housing adequate to meet the regional need. Based on current chronic homeless data and current unit inventory turnover rate, the report identifies a need for 226 units of permanent supportive housing in Washington County within the next ten years. As part of meeting the Metro framework unit production targets and the Washington County Implementation Strategy, the county is actively identifying experienced partners to collaborate with the county and other jurisdictions to deliver housing units with services to reduce

chronic or long-term homelessness by establishing a goal of developing 100 affordable housing units to serve those individuals and families that need treatment or support services.

Project Cost Containment and Efficiency

A goal of Washington County is to support a portfolio of projects that provide the best return on investment of public dollars. These projects are characterized by efficient design and durable construction. They will use cost effective measures to facilitate efficient use of energy and water and select materials that create healthy living spaces. They will be designed to meet the needs of the target households in terms of space, amenities and service requirements, and are valuable assets in the communities in which they are located.

Washington County also recognizes that the ability to leverage various funding sources will vary from project to project. The blend and availability of funding sources will have an impact on both hard and soft costs. Hard costs include expenses associated with the purchase of land or projects and construction of projects. Hard costs will be impacted by development standards of investors, lenders and other public funders. Soft costs include expenses associated with financing, architectural fees, reports, System Development Charges (SDCs) and land development costs. Soft costs will vary with specific legal, accounting, reserve requirements, and fees. Leverage will also be impacted by the service needs of the residents.

Based on Meyer Memorial Trust's *Cost Efficiency Report* (October 2015), Washington County will evaluate all proposed projects to ensure that the costs are reasonable and appropriate to the specific project. This evaluation may consider:

- Scale appropriate to the target population.
- Scale appropriate to the community in which the project is located.
- Costs associated with design requirements of the jurisdiction in which the project is located.
- Costs associated with mixed use projects.
- Quality of construction materials.
- Costs associated with service needs of the target population.
- Reasonable fees and reserves.

Washington County recognizes that in order to accomplish the overall unit production goal the average Metro Affordable Housing Bond Program investment per unit will be approximately \$143,000. The county anticipates Permanent Supportive Housing (PSH) projects will receive significantly more bond funds per unit while other projects that receive significantly more leverage will receive less bond funds per unit. Washington County will continuously monitor the overall pipeline of projects to ensure that the Metro Bond framework and Washington County Local Implementation Strategy requirements are being met. However, additional resources, including local, may be needed to meet the overall unit production goal.

Capacity/Readiness to Proceed

Washington County understands that the development of affordable housing differs in many ways from market rate housing or other real estate development. The county will partner with non-profit, private, or governmental organizations that have demonstrated skills as affordable housing developers and/or owners. Expertise with the framework target unit types and with the specific population proposed by a project will also be considered.

Timely implementation of the Metro Affordable Housing Bond Program is critically important. Washington County will prioritize projects that have a clear path to completion. For a project to qualify as “ready to proceed,” the developer will need to have site control, appropriate zoning in place or a plan to achieve appropriate zoning within six months of endorsement from the County, have identified an experienced development team, and have secured needed service partnerships. While Washington County may not make a funding commitment until projects meet “ready to proceed” criteria, the county will begin conversations with interested developers at the earliest stages of pre-development to ensure that the housing development project aligns with the Local Implementation Strategy.

VII. Project Implementation

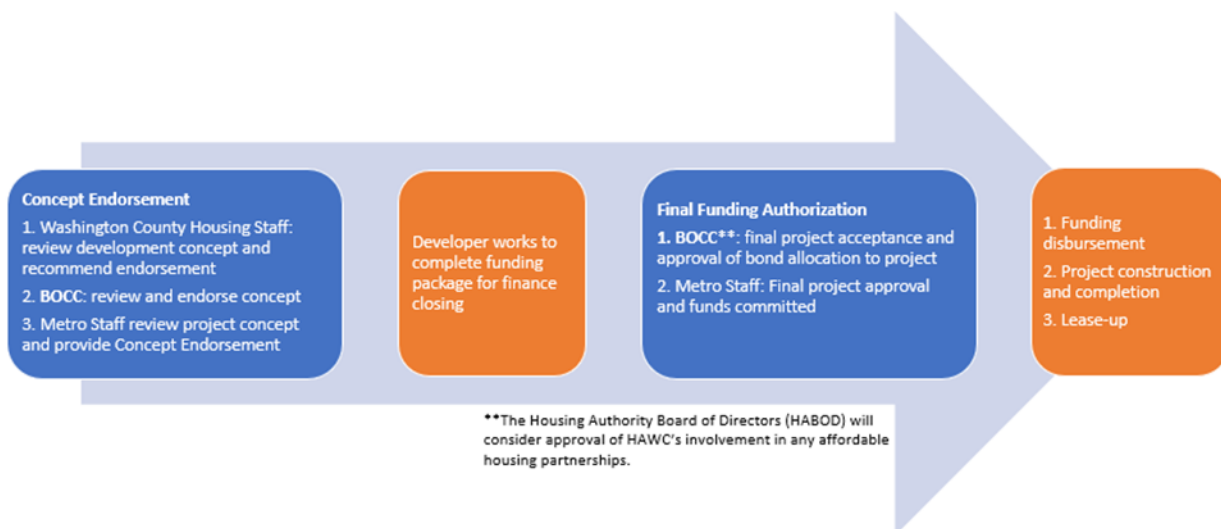
Review & Approval of Projects

Bond funded projects will go through a multi-stage review and approval process as follows:

- Washington County project initial review and concept endorsement. Before a project is forwarded to Metro for concept endorsement Washington County staff and/or consultants will review that the project must, at a minimum, have site control, a preliminary development plan, preliminary estimate of total development costs, preliminary estimate of needed Housing Bond funds, and an identified development team. The Housing Advisory Committee (HAC) which provides advice to the Housing Authority Board of Directors (HABOD) regarding affordable housing and programs to ensure residents are successful will provide input to staff regarding housing development projects suitable for Metro Affordable Housing Bond Program funding and located within the county bond implementation area. 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 residents. Staff will then provide a recommendation, based on input from the Housing Advisory Committee, to the Washington County Board of Commissioners.
- Metro concept endorsement. Metro staff will review the request, assess the project for conformance to the adopted Local Implementation Strategy and make a recommendation to Metro’s Chief Operating Officer (COO) for endorsement. Detail on concept endorsement is outlined in the Metro Approvals section of the Washington County-Metro Intergovernmental Agreement (IGA).
- Washington County project approval and funding authorization. As the project sponsor completes due diligence and moves to finance closing, county staff will process the project approval by recommending the project for final approval to the Board of Commissioners.
- HAWC ownership approval. If HAWC is involved as a partner and/or in an ownership position in a project, the partnership request will go before the Housing Authority Board of Directors for approval. After approval by the HAWC Board of Directors, county staff will process the project approval by recommending the project for final approval to the Board of Commissioners.

- Metro project approval and funding authorization. County staff, in conjunction with Metro staff, will present the project to Metro for final approval and funding authorization per the Washington County-Metro Intergovernmental Agreement (IGA).
- Release of Funds. Once a project has received approval by the Washington County Board of Commissioners and Metro, funds will be released from Metro to the Washington County Finance Department and disbursed to the project in accordance with the provisions of the project's legal agreements. During the construction of a project, the county will monitor the project to ensure compliance with project budget, specifications, and timeline (see *Project Monitoring* on page 26).

Washington County Metro Bond Project Approval Process



Project Closing

At project closing, the following will apply:

- Metro-Approved Regulatory Agreement. All projects will be required to execute a Metro-approved Regulatory Agreement that acknowledges the use of Metro Affordable Housing Bond funds and the restrictions associated with the use of such funds. The Regulatory Agreement shall be recorded against the project at or prior to closing.
- Period of Affordability. The Regulatory Agreement will generally specify a 60-year period of affordability for new construction. For acquisition projects that are more than 10 years old, Washington County may consider a shorter period of affordability, but the affordability will be no less than 30 years. The Regulatory Agreement will provide a first right of refusal for qualified nonprofit organizations, for-profit organizations or government entities to acquire the project upon expiration of the affordability period for those entities to maintain affordability of the project. The period of affordability may be impacted by other funding sources in a project (e.g. LIHTC, HOME). Each project will adhere to the most stringent requirement for the affordability period. This may

result projects having a longer period of affordability than required by the Metro Affordable Housing Bond.

- Accomplishment of Framework Targets. The Regulatory Agreement will also specify the level of affordability and the unit bedroom sizes of the project. While these requirements are memorialized in the Regulatory Agreement, affordability and unit bedroom sizes for a project will be determined and agreed upon by the developer, Washington County, and all funders at the time of initial funding commitment, well before completion of the Regulatory Agreement at closing.
- Jurisdiction Documents. Washington County may require other documents related to the project. Additional sources that leverage Metro Affordable Housing Bond funds, may require the following:
 - Development and Disposition Agreements. In the case of properties controlled by the HAWC, agreements relating to the transfer of property to the developer/owner will be required by HAWC.
 - Washington County will develop documents relating to how bond funds will be invested in a project. The type of investment may vary depending on the development's projected cash flow. For example, a housing development may require loans or grants to be dependent on the cash flow. In general, Washington County will support the allocation of program income to restricted reserve accounts dedicated to the provision of Resident Services. Projects that are expected to have more significant program income may have requirements for cash flow dependent distributions to the Washington County Housing Production Opportunities Fund (HPOF).
 - Washington County will specify requirements relating to implementation of Racial Equity Strategies. Strategies will be developed for each project and requirements will be documented in agreements with the County.

Project Monitoring

Projects will be subject to monitoring throughout the development process and period of affordability. The monitoring process and expectations will be documented in agreements with Washington County and HAWC. In general, monitoring will include:

- Monitoring During Development. Washington County will require monthly reports during the project development and lease up period and will conduct periodic site inspections in coordination with other funding partners to achieve on-time and on-budget completion. The Housing Services Department will approve all change orders and monthly draw requests.
- Lease-up. Washington County will monitor use of low-barrier screening criteria at projects funded by the Metro Affordable Housing Bond Program.
- During Operations. Washington County will require annual reports of developers, owners and property managers that include information about a project's physical condition, fiscal condition, occupancy, resident income verification, and voluntarily collected resident demographics. Washington County will conduct periodic site inspections in coordination with other funding partners.

Ongoing Community Engagement Plan

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. For this future effort, 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.

Washington County will work with the consultant to ensure that the ongoing community engagement will be timely, transparent, utilize plain-language principles, and include materials in all appropriate languages, and interpretation as needed. Community engagement will target three audiences:

1. Underrepresented communities – These are communities who have historically faced systemic barriers to affordable housing such as communities of color, people with low incomes, seniors, people with physical or mental disabilities, people involved with the justice system, people with limited English proficiency, immigrants and refugees, residents of affordable housing, people at risk of displacement, and people experiencing homelessness. Engagement will focus on community members providing advice about how Washington County can address and reduce these systemic barriers. Strategies are more likely to be ongoing rather than one-time or time-limited and consist of both traditional and more diverse engagement methods and opportunities. These may include conversations conducted via existing meetings, in-person gatherings designed to exchange information rather than collect it, storytelling sessions, and may be supported or conducted by nonprofits and community groups that are trusted within the community.
2. Neighbors living in the area or adjacent to the new affordable housing developments – Engagement strategies will be focused on neighborhoods where a specific housing project is proposed. Strategies are likely to be both in-person and online and will be limited to the time before and during which the project is being developed.
3. General community members – Engagement with the general community will be less intensive than with the first two groups but will be ongoing 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 (e.g., online feedback form).

To ensure that impacted communities are involved in decision making as much as possible, the community engagement consultant will:

- Maintain an interested and affected group contact list
- 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)
- Provide trauma informed engagement opportunities and environments
- Ensure that engagement opportunities are accessible to all by being held in the evenings and/or on weekends, in different community locations and places where people naturally convene, and include community support such as food, child care and translation services

Ongoing community engagement will be based on expressed needs of the potentially impacted communities for each project. This will be influenced by needs identified in Phase One portion of community engagement activities that informed the development of overall implementation strategies; findings resulting from the Consolidated Plan community engagement process; outcomes of each community engagement process that occurs in relation to bond funded project identification; and the evaluation findings from the Phase One community engagement process. In addition to this information, the consultant will also work with stakeholders to identify preferred methods of engagement and utilize engagement strategies that are flexible, and fluid based on community and stakeholder input. The outcomes and findings from all community engagement will be regularly compiled and shared with project planning staff.

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.

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 needs/wants and expected outcomes as evidenced in participation demographics and quality of participation, as well as resident demographics and outcomes in future affordable homes. Evaluation metrics include:

- Were you able to successfully reach the intended audience?
- Did people receive the necessary information they needed to make a relevant response?
- Did you choose the right type or level of engagement to match the purpose?
- Was feedback received from the community positive or negative?
- Did the community feel like they received proper feedback on the results of the engagement?
- Did they indicate they want to be part of a similar process again?
- If not, why not? And what could be done differently to make the process better, more inclusive, and more impactful?

VIII. Organizational Plan for Implementation

To be successful in the implementation of the Metro Affordable Bond Program, Washington County will use a combination of staff and consultants to meet the development goals and community engagement requirements. Washington County staff will be responsible for community engagement and outreach, project selection, project documentation funding processes, overall program monitoring and reporting. County staff will be responsible for the site selection, financial packaging and the development process for projects that HAWC will own. When expertise is not available within the county, consultants will be engaged with expertise in affordable housing financing and development to review proposed projects during the selection and commitment phases. Similarly, the county may engage consultants with expertise in construction management to help oversee development. Staff will also continue to collaborate with bond implementation partners within the County and throughout the region as appropriate to ensure that all Metro Affordable Housing Bond commitments are realized within the required time lines.

As mentioned at the beginning of this document, the Metro Affordable Housing Bond Program is a landmark effort to develop affordable housing in the tri-county region. To achieve the goal of developing 814 units of affordable housing in Washington County several county departments will be engaged in the implementation of the bond including Housing Services, Finance, Land Use and Transportation, Facilities, Community Development, and the County Administrative Office. Metro has committed \$2,451,906 in

administrative funding over five years to fund Washington County's costs to implement the Metro Affordable Housing Bond Program. The Finance Department has established a method to track all costs expended to implement the Metro Affordable Housing Bond Program. Annual reports will be provided to the Washington County Board of Commissioners and Metro.

IX. Reporting on the Washington County Local Implementation Strategy

Annual Report

Washington County staff will prepare an annual report to the Washington County Board of Commissioners on overall progress of the Local Implementation Strategy. This information will be made available to the public and interested stakeholders including cities and other jurisdictions that may be impacted using a variety of strategies such as published reports, newsletter articles and website postings and community conversations. The report will include information on committed and completed projects (e.g. project status, bond funding expenditures, total project(s) cost(s), and units produced by unit size, type and income level served). The report will also include information on overall progress toward achievement of the framework goals. When the LIS is updated at 18-24 months and at 48-60 months, new information gathered through the consolidated planning process and other sources will be used to update the LIS and will be reported in the annual report.

Reporting to Metro

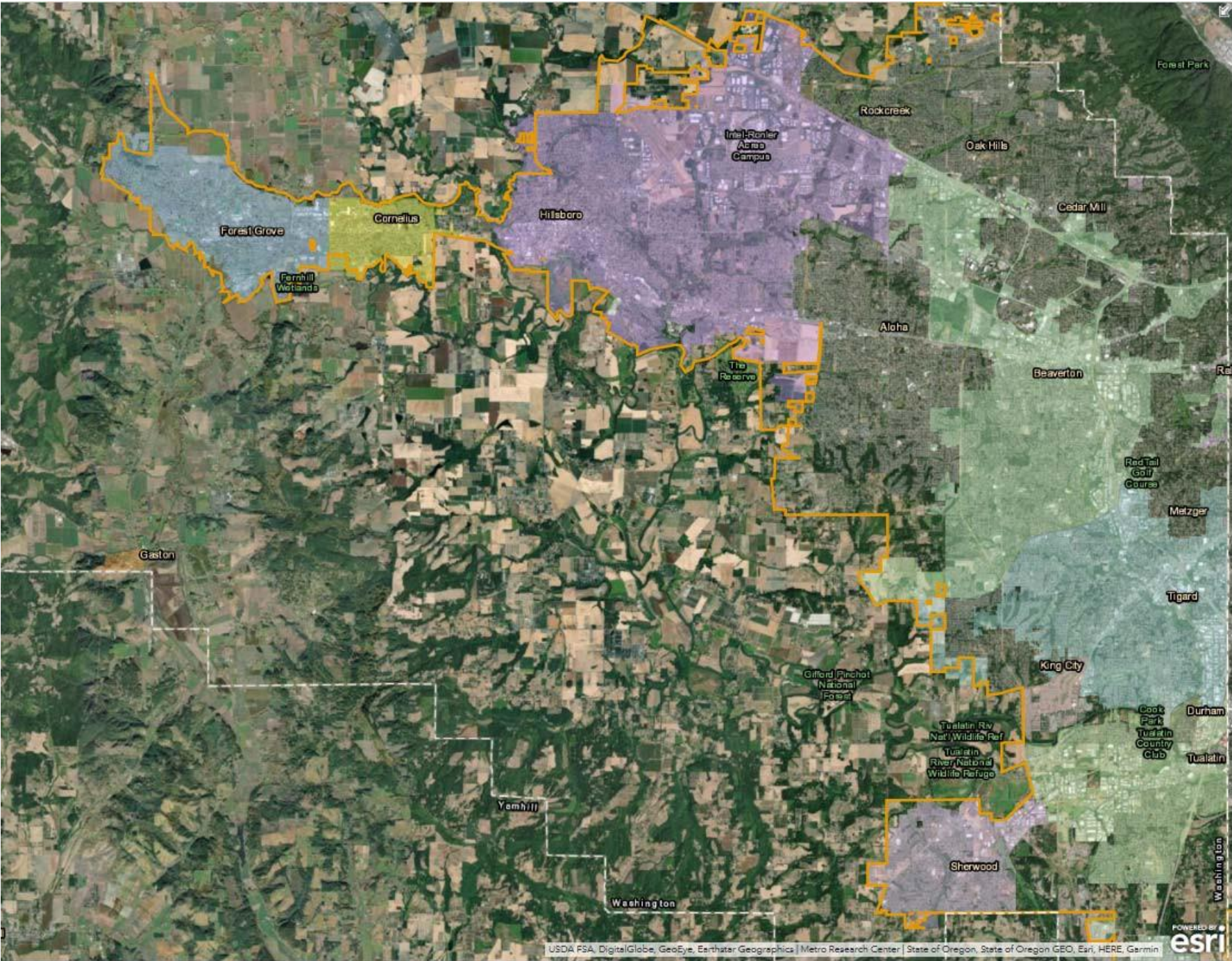
Washington County will submit annual reports to Metro in accordance with the Intergovernmental Agreement.

For more information or to provide comments please refer to:

<https://www.co.washington.or.us/Housing/AffordableHousingBond/index.cfm>

or contact the Washington County Housing Services Department at: 503-846-4795 or AffordableHousingBond@co.washington.or.us

Appendix A: Metro Jurisdictional Area in Washington County Map



Washington County Metro Bond Proposed Portfolio - For Illustrative Purposes Only

6/14/2019

Projects with site control

Project #	Total # of units	30% MFI units	60% MFI units	80% MFI units	Jursidiction/ Neighborhood	Target population	2+ bedroom units	Development Type	Total Metro bond funds	Anticipated Leverage funds
1	80	33	41	6	Tigard/ Tigard Triangle	individuals and families	40	New Construction	\$ 11,440,000	\$ 17,360,000
2	5	0	2	3	Unincorporated Washington County / Aloha	families	5	Homeownership - New Construction	\$ 500,000	\$ 750,000
3	68	23	45	0	Unincorporated Washington County / Cedar Mill	individuals and families	35	New Construction	\$ 9,724,000	\$ 11,084,000
4	175	70	105	0	Tualatin	individuals and families	70	New Construction	\$ 17,500,000	\$ 30,625,000
5	56	25	20	0	Tigard	seniors	0	New Construction	\$ 6,720,000	\$ 7,280,000
6	36	7	29	0	Forest Grove	individuals and families	28	New Construction	\$ 4,388,364	\$ 6,051,636
<i>Subtotal</i>	<i>420</i>	<i>158</i>	<i>242</i>	<i>9</i>		<i>Subtotal</i>	<i>178</i>	<i>Subtotal</i>	<i>\$ 50,272,364</i>	<i>\$ 73,150,636</i>
<i>% of total goal</i>	<i>51.60%</i>	<i>47.31%</i>	<i>60.65%</i>	<i>11.11%</i>		<i>% of total goal</i>	<i>43.73%</i>	<i>% of total goal</i>	<i>43.17%</i>	

Note: No funding committments have been made to any projects in this proposed portfolio.

Washington County Metro Bond Proposed Portfolio - For Illustrative Purposes Only

5/17/2019

Potential and/or anticipated projects

Project #	Total # of units	30% MFI units	60% MFI units	80% MFI units	Jursidiction/ Neighborhood	Target population	2+ bedroom units	Development Type	Total Metro bond funds	Anticipated Leverage funds
7	67	20	27	20	TBD	individuals and families	67	Acquisition	\$ 9,581,000	\$ 10,519,000
8	77	20	57	0	TBD	individuals and families	30	New Construction	\$ 11,011,000	\$ 15,939,000
9	72	15	57	0	TBD	individuals and families	35	New Construction	\$ 10,296,000	\$ 14,904,000
10	20	0	5	15	TBD	families	20	TBD	\$ 2,000,000	\$ 4,000,000
11	60	60	0	0	TBD	seniors - PSH	0	TBD	\$ 11,508,168	\$ 6,491,832
12	79	31	48	0	TBD	individuals and families	47	TBD	\$ 11,297,000	\$ 16,353,000
13	30	30	0	0	TBD	formerly homeless families - PSH	30	TBD	\$ 10,500,000	\$ -
<i>Subtotal</i>	<i>405</i>	<i>176</i>	<i>194</i>	<i>35</i>		<i>Subtotal</i>	<i>229</i>	<i>Subtotal</i>	<i>\$ 66,193,168</i>	<i>\$ 68,206,832</i>
<i>% of total goal</i>	<i>49.75%</i>	<i>52.69%</i>	<i>48.62%</i>	<i>43.21%</i>		<i>% of total goal</i>	<i>56.27%</i>	<i>% of total goal</i>	<i>56.83%</i>	

Grand Total - Combined Projects with Site Control and Potential/Anticipated Projects

	Total # of units	30% MFI units	60% MFI units	80% MFI units			2+ bedroom units		Total Metro bond funds	Anticipated Leverage funds
Total	825	334	436	44		Total	407	Total	\$ 116,465,532	\$ 141,357,468
<i>Target</i>	<i>814</i>	<i>334</i>	<i>399</i>	<i>81</i>		<i>target</i>	<i>407</i>	<i>Target</i>	<i>\$ 116,465,532</i>	
<i>Difference</i>	<i>11</i>	<i>0</i>	<i>37</i>	<i>-37</i>		<i>difference</i>	<i>0</i>	<i>Difference</i>	<i>\$ -</i>	

Note: No funding committments have been made to any projects in this proposed portfolio.

Appendix C: Community Engagement Results

During the months of February, March and April, the Washington County regional project team held listening sessions with the community to better understand key issues and suggestions for addressing issues related to affordable housing with Washington County. In an effort to be most efficient, the project team opted to attend existing community and agency-based meetings in an attempt to gain as much varied input as possible from a broad range of folks. Every effort was made to approach all of the community engagement activities through a lens of equity and inclusion with special attention paid to reaching the perspective of historically underrepresented groups.

The project team was able to hear from nearly 300 people representing over 50 agencies, as well as members of affected communities. At each opportunity the team provided a brief overview of the Metro Affordable Housing Bond and its impact in Washington County, and a description of the collaborative community engagement conducted between the three jurisdictions (cities of Beaverton and Hillsboro and Washington County). Listening sessions included facilitated discussions to answer the following questions:

- What are the things that are most important to you and/or your family when you think about where you want to live?
- What do you think are the biggest challenges people have with keeping their housing?
- What types of services, programs, and/or activities are needed to overcome these challenges?
- What do you think are the biggest challenges people face when trying to find a place to live?
- What is the best way for you to find out about available housing?
- Is there anything else you'd like to share about your experience or the need for housing in your community?

Overall, the participation of particular populations in focus groups or events is illustrated in the table below:

Participating Populations	Focus Groups or Events
Low-income individuals	Washington County Resident Advisory Board meeting, Homeplate meeting, Root Policy focus group
Seniors	Washington County Resident Advisory Board meeting, CPO Homelessness Forum
Youth experiencing housing instability	Homeplate meeting, Root Policy focus group
Individuals with physical disabilities	Washington County Resident Advisory Board meeting
Individuals with developmental disabilities	Root Policy focus group
Individuals with mental health concerns	Root Policy focus group
Individuals with addictions issues	Root Policy focus group
Individuals with limited English proficiency	Washington County Resident Advisory Board meeting, SOAR Immigration Legal Services Group
Immigrants and refugees	Washington County Resident Advisory Board meeting, SOAR Immigration Legal Services Group
Individuals with current or previous experience of housing instability	Washington County Resident Advisory Board meeting
Residents of low-income housing	Washington County Resident Advisory Board

	meeting
Justice-involved individuals	Root Policy focus group
Service providers for people on probation and currently incarcerated	Washington County Parole and Probation Meeting
Community Participation Organization (CPO) members	CPO Homelessness Forum
Tribal community members	Centro Cultural meeting
Veterans	DAVS Seniors meeting

Housing Support Services Network, Community Housing Alliance, Community Action Housing Services Provider, Housing Specialists and Resident Advocates, and the Washington County Resident Advisory Board

Comprised of 104 participants including over 20 community members who currently live or have lived in low income housing, and representatives of 42 organizations serving culturally specific populations and/or individuals and families who are "at risk" of becoming homeless or who are homeless and may have special needs. This group was made up of individuals from diverse age range, racial, socio-economic, and ethnic backgrounds.

KEY FINDINGS: It's important to have housing in walkable neighborhoods, close to transportation and services. Cost is the number one barrier to obtaining and sustaining housing as well as screening criteria such as credit score requirements and restrictions due to criminal or rental history. Culturally appropriate services are needed to help navigate the affordable housing system as well as provision of mental health and substance abuse services. Use of community based organizations that people already know and trust was suggested.

When thinking about what is most important about where they live, participants cited:

- Walkability
- Close proximity to transportation and services such as grocery stores and community-based organizations
- Mixed income communities – not just a concentration of poor communities in one area

Barriers and challenges to finding and sustaining housing were identified as:

- Not enough affordable housing
- Waitlists are very long
- Strict screening criteria (no past evictions, credit score requirements and past criminal history restrictions)
- Mental illness and the need for additional support to maintain independent living
- Lack of housing for large families
- Inability to keep/have pets
- Difficulty to find housing with a criminal history
- Discrimination (ex. Application forms only available in English)
- Fear of working with government agencies such as the housing authority and disclosing information due to fear of deportation

- Affordable housing applications/process is hard to navigate – there's no consolidated list of all housing options

Service Needs identified include:

- Onsite substance abuse and mental health counseling/services
- Culturally appropriate service advocates
- Services for developmentally disabled
- Alignment and ability to share information (via shared database) between housing and service providers
- Tenant renter readiness/education program for homeless individuals to prepare them for sustaining housing and prevent evictions
- Advocates to help navigating the system
- Streamlining system to create one application versus multiple applications with multiple fees
- Create better system for finding out about housing – not just online
- Community based organizations need support to assist with communicating with property managers

SOAR Ecumenical Ministries of OR Immigration Legal Services, Oregon Law Center, and Centro Cultural (Cornelius)

Comprised of 24 individuals including 19 Hispanic community members for whom Spanish is their first language (with one session conducted in Spanish), and 5 service providers serving the Hispanic community.

KEY FINDINGS: Feeling safe in the neighborhood is very important (particularly safe from deportation). Cost is a huge barrier to finding housing as is screening criteria such as the requirement of a social security number. Culturally specific programs with trusted community based organizations are recommended to help people navigate the system, job training programs, and help with obtaining legal status.

When thinking about what is most important about where they live, participants cited:

- Affordable rent
- Walkable neighborhood – walking is key when issues with getting a license
- Close to public transportation – due to difficulties in getting a license
- Safe neighborhood – low crime/ where you can feel protected and not targeted
 - A strong desire to feel safe in their home was mentioned by every participant
- Close to services - trusted organizations
- Close to fresh, health food
- Close to good schools and parks
- Schools and hospitals
- A quiet neighborhood

Barriers and challenges to finding and sustaining housing were identified as:

- Lack of access to jobs with good wages due to legal status
- Not having a social security number
- Language, how to complete all the information required
- Childcare – costs are high and it's hard to find safe, reliable childcare
- A lot of immigrants work independently due to legal status which makes them vulnerable to low or no payment and no benefits – if you get sick you can't work and there's no paid sick time
- When there is an ICE raid at an apartment complex people will never go back and are fearful of seeking housing at many places that have a reputation for ICE involvement
- Access to financing
- I don't have them because I live with my son
- Asking too many requirements because many of us don't have many financial means.
- Cost -rent is very expensive for low income people like us.
- Not enough housing
- We need money to move to another place – deposit, move in expenses are very high
- Lack of loans
- Age and race discrimination
- No support/services onsite - just a place to live
- You have to stay working in agriculture to keep your housing but then you can't earn enough to save up for a down payment on a house, so you're stuck renting
- Rent increases each year, sometimes twice in one year, but you don't get raises to keep up with rent increases
- very long waitlists and they can't tell you how long it will be or if you will ever get an apartment
- In private apartments you don't have the protection of government run apartments - so the private landlords won't fix things and give 2 weeks' notice to move out

Service Needs identified include:

- People want to work with agencies/orgs. they trust, or that they know someone at or know someone who has received services there.
- When you don't have legal status it's very hard to navigate the system without any identification. There needs to be a way to complete required paperwork with an alternate ID.
- Assistance with water, electricity
- Building more housing for older people with low income
- Some money for rental assistance
- Programs to help with financial assistance that has fewer requirements
- Workshops about how to buy a house and financing
- Affordable payments
- More programs for people who speak Spanish
- Educations about the rights to obtain low cost housing
- Information about available options
- More help to complete applications

- A program that provides rent assistance when somebody loses his/her job

Washington County Parole and Probation and Bridges to Change

Comprised of 8 service providers serving those currently incarcerated or on probation

KEY FINDINGS: Housing near transportation and close to required services is important. Housing costs are a huge barrier as is screening criteria that prevents people with criminal history or past evictions from renting. Onsite services such as mentor programs are recommended to help prevent eviction when relapse happens as well as assistance with job training and complying with court mandates.

When thinking about what is most important about where they live, participants cited:

- Close to public transportation with shorter trip times – so it doesn't take a long time (eat up a lot of your day) to get to treatment services, work, etc.
- Close to services - trusted organizations
- Near grocery stores – not in a food desert
- Away from Portland – for those in recovery they may want to be out of the city
- For those who are registered sex offenders they can't live near schools/parks
- For families – near schools

Barriers and challenges to finding and sustaining housing were identified as:

- Cost of housing is unaffordable
- Poor credit history or no credit history
- Criminal history – no one will rent to them
- Poor housing/rental history
- Those with arson records are very hard to find housing for
- Do not have the proper identification to apply
- Scarcity of options
- Complex application process – red tape
- Lack of support/patience with vulnerable populations on part of housing providers (specifically Washington County Housing Office – to help people get on waitlists)
- Deposits are too high even if you can afford the rent – no way to come up with 1st, last, and deposit
- Limit to number of people per unit- people with large families or families that want to pool their resources and share costs can't find housing that will allow them to live together
- Stigma – community judgement
- Lack of case management
- Discrimination
- Fears about losing housing – afraid to get it then lose it

- Undocumented – fearful of completing forms or unable to provide identification
- Finding housing options is difficult for service providers – addictions service providers do not have access to system that County and Mental Health use
- For those in recovery – relapse, if you relapse, which is part of recover, you're kicked out
- Mental Health – those who don't meet criteria for SPMI housing, however, need support
- Rent increases
- Utility costs – especially if hold on utility account
- Debt – can't pay rent and keep up with debt payments – court fees, etc.
- Mix of people, especially in shared living spaces – hard for people to get along
- Domestic violence/trauma history
- Housing unsafe – vulnerable populations don't know how to advocate or are fearful of advocating for safe living environments
- No housing supplies – basic furniture, dishes, etc....

Service Needs identified include:

- Onsite services to help with relapse such as mentors, mental health, UA's onsite.
- Less restrictions regarding relapse – so people don't lose their housing if they relapse and seek help
- Community rooms onsite where people can meet with peers for support, hold meetings, etc.
- Housing Coordinator onsite who can help connect people with resources
- Connection with CBO's – allow onsite for services, coordinate to provide services for people living there
- Allow support animals and make more ADA accommodations
- Keep family, loved one's together – no housing where it's only adults or only male or female
- Skill building/education provided to teach people how to keep housing – how to clean, provide cleaning supplies, budgeting, work skills, etc.
- Utility assistance
- Financial education/skills – how to save – provide credit for attending trainings that goes toward deposits, utilities, household items, or other housing related items that help people get or stay in housing
- Case management
- For those with arson history – provide financial incentives for landlords to give them a chance and rent to them – same for those with sex offender records
- Pathways to progression through housing should be clearly identified – so that someone in an Oxford house situation knows how to take the next step and can then free up a bed for someone who needs that level of housing support. Currently people get stuck at certain steps with no idea of how to go to the next level of independent living
- Relationships with landlords are needed as well as neighbors so people aren't so intimidated to apply
- Online – easy access site needed with all housing resources
- Streamlined housing application processes are needed so people can do one application for multiple available places and get matched up

Self Determination Resources Inc. (SDRI)

Comprised of 5 service providers who serve people who have disabilities.

KEY FINDINGS: Housing near transportation is essential. Screening criteria is a barrier to obtaining housing, particularly credit score requirements. Onsite services and assistance with move in fees are needed to help people get into housing.

When thinking about what is most important about where they live, participants cited:

- Build housing close to transportation – essential for DD population, also close to services, stores, etc.

Barriers and challenges to finding and sustaining housing were identified as:

- Adjust Property management companies screening criteria, requirements for credit scores, etc. are very high. They should also have training on working with underserved populations as they are often not respectful and not helpful for those seeking housing.

Service Needs identified include:

- Provide onsite or intensive services for job support, household support (bills, cleaning, financial management), medical needs (particularly for the DD population).
- Reduce the amount of deposits required for move in. Even when people can afford a place they can't get enough money together for the deposit, even for subsidized housing.
- Rent costs need to be drastically reduced, even reduced rent rates are too high.
- Create more subsidized housing; with voucher systems, when people participate in job skills programs and get better jobs, they can lose their benefits vs. subsidized where it's always a portion of your income so you won't lose your housing benefits completely.
- Create screening system/risk assessment for those with criminal record. DD clients have criminal history due to being taken advantage of, however, may not pose a threat/danger to anyone, yet they can't find housing due to criminal history status. Huge problem – described 2 stories of clients who were talked into using their credit cards to buy/sell things for friends that were illegal, or their computers/email accounts were used to commit fraud; they thought they were helping a friend.
- For DD population have coordinators in loop and allow them to give input into what criminal history actually is.

Homeplate

Comprised of 12 youth who are currently experiencing or who have experienced homelessness

KEY FINDINGS: Feeling safe and secure where you live is very important. It's very hard to afford housing, especially when you have limited education and can't get a job that pays enough to afford rent. Employment assistance and job training is very important for youth.

When thinking about what is most important about where they live, participants cited:

- Safe place
- Near transportation

Barriers and challenges to finding and sustaining housing were identified as:

- Cheaper housing with less restrictions and no extra fees
- Low on money
- Lower prices for houses
- Money
- Resources
- Roommate help, bill help
- Safe place
- Stable income and resource flow
- A place you can afford with a low income

Service Needs identified include:

- Build a shelter for everyone
- A job
- Stable employment and financial support/tutoring
- A place for teens under age 18 looking for their own place to live

Community Participation Organization (CPO) homelessness forum facilitated by Community Action

Comprised of 43 CPO and community members, held at the Cornelius Library

KEY FINDINGS: Housing close to services and employment is important. Gentrification has created rising rent costs that prevent people from being able to afford rent or buying a home. Onsite services are necessary and additional support for Seniors and the mentally ill are needed.

When thinking about what is most important about where they live, participants cited:

- Close to schools – (good/quality schools)
- Recreation – close to green spaces and parks, things to do
- Close to employment
- Close to medical services
- Close to affordable food options
- 1st mile last mile – no transportation gaps from home/work to bus lines
- Storage – access to temporary storage for those who rely on public transportation – so if you bring your backpack or groceries, there is a temporary storage place to put them while running errands, et...
- Safe neighborhood
- Close to public transportation with shorter trip times to services, work, schools, stores
- Close to services

Barriers and challenges to finding and sustaining housing were identified as:

- Employment – stable and living wage
- Lack of knowledge of land lord tenant laws
- Gentrification/Displacement – people priced out of their homes
- Rising Rent Costs
- Not enough available housing – even if you do have a voucher – no affordable housing available
- Lack of enforcement of housing laws
- Sex offenders can't find anyone who will rent to them
- Screening criteria
- Lack of knowledge of land lord tenant laws
- Move in costs (deposits/1st and last)
- Most places won't accept pets
- Very few options for large families – restrictions on number of people per unit
- Neighbors don't want low income housing in their neighborhood

Service Needs identified include:

- Onsite services - wraparound services, support services
- Collaboration with law enforcement – so LEA can work with service providers/case managers to assist with clients who are trespassing (for example) to prevent their clients from having a criminal record, which makes it even more difficult to find housing
- Case management
- Assistance with utility costs
- Services for Seniors
- Support for those with mental illness
- Education about renters' rights and housing laws



WASHINGTON COUNTY OREGON

Date: May 7, 2019

To: Consolidated Plan/AI Work Group

From: Staff, Office of Community Development

Subject: Focus Group Preliminary Results

JTH

To-date, four focus groups have been conducted. The groups our team has met with include Homeless adults at Sonrise (Jen Garner/Ann Hawkins), At-risk youth at HomePlate (Jen Garner/Ann Hawkins), Residents at Community Corrections (Jen Garner/Mari Valencia), residents with a mental illness (Mari Valencia/Ann Hawkins). We were not able to schedule the other two groups (elderly and disabled adults) so those will be planned at a later date.

Attached is a "topline" summary from Root in addition to the detailed notes from each session. One of the sessions was conducted by OCD staff so the format from those notes are different.

Jen Garner, from Root Policy Research will present on the focus group findings. She will be linked into our meeting via GoToMeetings.

Attachment

Office of Community Development
328 West Main Street, Suite 100, MS 7, Hillsboro, OR 97123-3967
phone: 503 846-8814 • fax: 503 846-2882

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M MORANDUM

To: Washington County Consolidated Plan and AI team
From: Jen
Re: Topline thoughts from first round of focus groups
Date: April 24, 2019

To date, four resident focus groups have been moderated (three by Root, one by Mari):

- Homeless adults at Sunrise;
- At-risk and homeless youth at Homeplate;
- Residents serving time in Washington County Community Corrections; and
- Residents with mental illness served by Sequoia.

The focus group discussions underscored that the factors which contribute to homelessness and housing insecurity among Washington County residents fall on a spectrum, ranging modest cash shortfalls leading to eviction to family dissolution or disfunction to suffering from severe mental illness and substance use disorders (addiction and/or alcoholism). As participants discussed the type of housing situation that would best help them on a path to stability, their responses emphasized the importance of Washington County and its partners providing a diverse set of housing programs and supports ranging from rapid re-housing with no supports, to short term (less than 60 days) shelter with limited supports, to permanently supportive housing, and a range of options in between.

Homeless Adults

The adults experiencing homelessness who participated in the discussions currently camp or live in their vehicle. They are chronically homeless and all but one disclosed severe mental illness and/or addiction to opiates or methamphetamine or related physical disabilities, and/or mobility disability. Some are currently unemployable due to addiction and/or mental illness. Others have injuries that prevent working in their trade and need retraining. Some are unable to keep employment as a direct result of their homelessness (e.g., hygiene, no storage for personal belongings). Not surprisingly, a wide range of housing options, and movement from one to another along a spectrum of independence, from short-term transitional shelter to permanent supportive housing are needed.



Most are chronically homeless and camp or stay in their car

8 of 9 disclosed mental illness, addiction, and/or physical disability

Most have significant barriers to stable employment

Basic needs minimally met

Storage for belongings during work/appointments, gas cards, and fresher food needed by some



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Full spectrum of housing options needed along with range of services

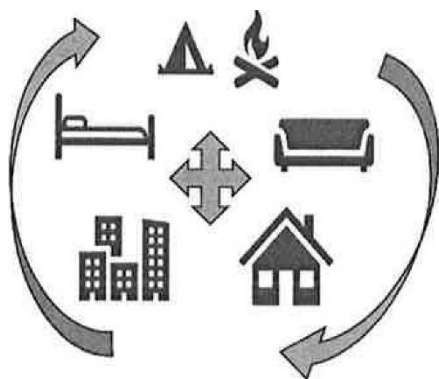
Some may require intensive treatment before housing placement

Some just need <60 days of guaranteed shelter to get on their feet

Source: Root Policy Research from Sunrise Homeless Adult focus group conversations.

At-Risk and Homeless Youth

The youth at risk of homelessness and homeless youth who participated in the discussions at Homeplate generally live in chaotic circumstances, moving in and out of homelessness; couch surfing, living with family, renting with friends, to camping or sleeping at youth shelters (as a last resort). Youth expressed the competing desires of wanting to live independently while needing skill development and support to achieve stability and grow into successful adults. Homeplate is a trusted resource and ideal location for service delivery. Support for expanded drop-in days/hours is desired and could be leveraged to further support these youth in employment, housing, financial, and life skills development.



Housing situations are chaotic, unpredictable, and short term

Most disclose dysfunctional family situations, some mention drug use

Most lack basic job readiness skills

Basic needs somewhat met

Strong need expressed for expanded drop in hours + services at Homeplate



Housing options should include varied degrees of independence/support

Need for tenant readiness, and other independent living skill development

Consider housing options for couples, parenting children, or peer groups

Source: Root Policy Research from Homeplate At-Risk and Homeless Youth focus group conversations.

Community Corrections

Participants in the Community Corrections focus group had a wide ranging discussion of housing choice, access to opportunity, law enforcement and prosecutors, and the extent to which Washington County's probation-system hinders rather than helps their reentry into the community. Criminal history is the primary barrier to securing housing of choice, followed by the cost of securing housing (e.g., deposits, first and last month rent). Most did not express difficulty finding employment, but they did share that the mandatory, fixed, probation requirements, often led to job loss, as the newly employed must request time off to attend meetings, classes, etc. There is an opportunity to explore joint probation/housing programming that rewards progress toward goals and living as responsible, contributing members of society. This population needs hope.

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III<=>

Prior housing situations ranged from homeless to homeowner

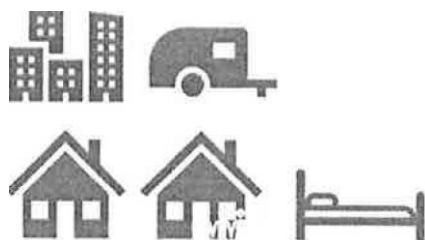
Many disclosed history of addiction, drug crimes

Criminal history and lack of training barrier to employment for some

strict probation requirements at
mandatory times, risk of losing
event the well-intentioned, up to failure



Need for treatment not jailtime



Criminal history = #1 barrier to housing choice, need "felon-friendly" options

Consider time-limited rent support to help the formerly incarcerated stabilize

Eviction prevention may be crime prevention for this population

Source: Root Policy Research from Washington County Community Corrections focus group.

Residents with Mental Illness

Residents with mental illness and/or a history of addiction participated in a focus group convened by Sequoia and included residents of peer-supported group living homes and residents of project-based subsidized housing with supportive services. All strongly value their case managers and the role the case manager plays in helping them live independently. With respect to supportive services and other program providers, participants described a need for training in trauma-informed care and increased knowledge of best practices in providing care to residents with mental illness. A number of residents expressed desire for the companionship of pets, suggesting a potential need for emotional support or companion animals. Educating this population about their fair housing rights and considering the therapeutic value of pets in housing program design is indicated.



Live either in peer-supported group home with services or in project-based subsidized housing with supportive services

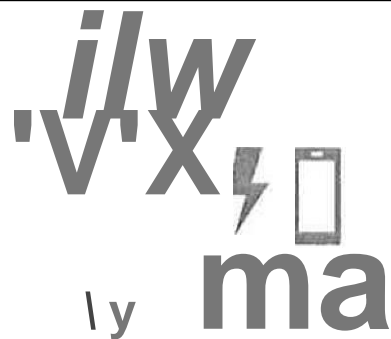


11 have a history of severe mental illness and/or addiction

Disability may limit employment

Case managers are critical to stability

Educate residents about fair housing rights, including reasonable accommodations



Most are satisfied with current housing situation

Monitor the extent to which people are living in the most independent, integrated setting

Residents prioritize housing that is safe, transit access

Source: Root Policy Research from Sequoia Mental Illness focus group facilitated by Washington County staff.

Focus Group/Pop Up Notes

If possible, try to organize your notes by category, to make it easy to see and incorporate into the AFH.

Section III Feed Citizen Engagement

Group Location/Date/Time/Host

Washington County Community, C.orrrections/April 17, 2019/10:15-11:45/Washingfo n Gounty
ComliT1uAity G:0rr ctiorrs

R/ECAP?

Demos: (approximate to the best of your ability)

of Attendees: 10

by race/ ethnicity: 2 Hispanic, 2 African American, 6 White

by disability

by families w/ kids:

by language other than English (and the language)

Attendees: 10

Language: English

Typically under-represented population? Yes, people currently in Washington County Community Corrections, very low income, history of drug or alcohol addiction, prior criminal history

How recruited: The 10 attendees volunteered to participate in the focus group coordinated by Washington County Community Corrections . Each received a \$20 WalMart gift card and refreshments during the discussion.

List of organizations consulted:

Washington County Community Corrections

Section V Feed Analysis

Current Housing Choice

Where they live, experience getting their place to live, why picked location, etc.

Participants discussed their housing situation prior to their arrest/conviction and the housing situation they expect to enter upon release.

I can't go home due to an open situation with a restraining order. I don't know where I'll go.

Maybe a hotel or motel. I was in a trap house when I lost my housing. I'll go into sober living.

I have a house.

I'm going to *live* with family.

I'm a homeowner, but I can't afford to keep my house. I'll have to sell it. I got it through the self-sufficiency program with Section 8 when I was working as a welder. I made good money. I can't do that any more.

I'm going into a Oxford house.

I'm going to Rinko, a transitional program for single moms.

I have a compound in the woods. I'm homeless, but I have a storage unit. I can couch surf if I feel like it. Because of my history with firearms and drugs, I have to work for cash under the table. I'd need \$4,000-\$5,000 to get into the place. I really just need a one bedroom, so I'm looking for a 5th wheel trailer.

I'm a felon, so that's it.

If you have a lot of felonies, you can get felonies off your record, but it costs a lot of money.

Housing is impossible if you have a record or are on probation or parole. The classes make it harder to work and your PO can just hit you with another class or another requirement.

There are no felony friendly (apartment) communities here. The property management or the HOA discriminates against us that way.

You have to take time off work to apply for housing.

You pay so many application fees, and you get denied and denied. By the end, you've maybe spent \$1,000 on nothing but applications.

They won't disclose that they won't rent to felons. They say, they'll look at you as an individual, but they don't. Disclosure won't do it.

We need subsidized apartments. Maybe a way to step back in, make an effort, show that you're working and get on track. It'd be good to have a mentor to help stay on track. The mentor could help find housing and check in.

I'm trying to get out of my Mom's, but I'm still in the nest. Some felons are good people and hardworking. But, they see the felony only and it's bad.

They should take into consideration the type of felonies you have. And also, sometimes, the charges are just what you had to plead into. Do more research on the person.

Quintana Crossing has housing for a mix of people. We need more felon friendly housing by mass transit that's on a sliding scale. There need to be options for housing.

It (most helpful type of housing situation) depends on the individual. Because you don't know what their challenges are. Me, having my own place, it would feel like an achievement.

Jobs are so important, but sometimes they don't pay enough for rent and all the classes and UAs the PO requires. Before this, I had an apartment. I was \$150 short on my rent, so I went out and got a package (of drugs to sell), and here I am.

Not all sober living are really sober living. I was in one and everyone was using. I couldn't stay clean there.

Or everyone else is dealing with their issues and it's crazy there.

For me, the #1 priority (for CDBG) is housing, rent supported housing. People are working and paying more than half their check to be here. When we line up for release, we should have a housing opportunity.

County Criminal Justice System-Law Enforcement, Courts, Probation

Include anything relevant to the County system

The system makes it so hard to stay on track. Instead of three years or probation, why not have incentives so that we can catch a break and boost our confidence, a reward system.

DOC should make sure they're following up with people who need housing. The PO should be a resource; everyone needs assistance.

There's been a huge shift in how POs treat people. They seemed more helpful, not lenient, but helpful.

I think it really depends on the PO. Not all of them have that attitude.

What if we created incentives for people to be on the right path and stay on the path. Like expunging felonies. Wipe them away with the understanding that if you go back, the felonies are back.

Certain counties have Clean Slate. It should be expanded to all counties. In OR we can do more to give people HOPE that the past won't always keep them down.

In Washington County, the DAs and the judges are toughest on Blacks and Hispanics.

One and a half years ago, I went to see my PO and my exes [relative] works in [criminal justice.] I posted bail, and the [relative] had called ICE on me because I'm Hispanic and he thought I was illegal.

I know other Hispanics who went to see their PO and that got took from ICE.

Washington County is the worst on the racial thing. People say, 'it's good to be white in Washington County.'

Washington County does probation different (than other counties in Oregon). Judges hit you with anything they can and the probation is much more strict.

If you drive in Washington County, you see less homeless, and that's because the county chases them into Portland.

If people are trying to do their best (comply with probation), and they're going to the drug classes, if the bus is late and you miss a class, even if you call your PO, you're back in and you lose your job and your home, again.

DAs are strict. There was a pipe in my car, that wasn't mine, I've been clean for two years. But there weren't any drugs, just a pipe, and I got a felony possession charge for something in a car that wasn't mine.

Washington County has a 98% plead rate. They put so much freight on you that you have to plead, because if you try to fight the case, they put so much on, you'll never get free, so you plead to whatever.

I paid \$3,000 for a lawyer to fight misdemeanors and I got 6 months and white guys get 30 days. (Hispanic respondent)

The Washington County DAs are the worst; they want nothing but maximum penalties.

I was going to school and working, when I got picked up, and the judge sentenced me here. If I'd been able to get probation, I could have kept my job and my spot in school.

You spend your life chasing the paper (complying with probation).

Examples of Housing Discrimination

Include anything that seems like direct housing discrimination

With respect to housing discrimination, the group did not think their race or ethnicity was a barrier, just their felonies. They discussed discrimination on the basis of race in the context of employment.

Access to Proficient Schools

Include anything about neighborhood schools/school choice, etc

Access to Transportation

How do they get around? Are they able to get to the places they need to go? What challenges do they experience?

A lot of classes, like the drug treatment classes, and POs are in areas that don't have access to transit. If you don't have a car or a ride, you can't get there. And then you pay the price.

Access to Services

Include anything related to health and human services

LifeWorks, CODA and NARA are places to go for mental health and addiction

We do need to deal with mental health and give financial support when people put in the effort.

People with addiction, it's hard to get clean.

You've got to stay in meetings (12 Step).

You can call Community Action for help. You can take them final notices on rent or utilities and they'll help you out. But you can only do that in limited amounts. Once every six months.

Where else can you get help?

CR

House of Hope

Sonrise

Homeplate helps with everything, but you age out.

What if you could get more funding, resources, if you're trying to be successful. I don't want a handout, I want to prove I'm working hard and can show proof of that, then maybe you could get more help.

They (County, service providers) should have a solid team of five or six people that canvass in certain areas to let people know about the help available. Like 185th and the [TIB?] Highway or 185th and Baseline.

We need a community center with mentors to help get people out of gangs, drug addiction. I'm trying to be a mentor, because I've left that life behind. I left that life in L.A. If we had people, mentors, who had been through shit but got beyond it, and are successful, that's the help we need.

Think about Community Revolution in Progress (acronym for CRIPs), taking that past and building it into positives and getting back into the community. If they really want it, support them.

My #1 priority is drugs. With drugs comes crime, with crime there's no hope, no dreams. Only a limited amount of people can get help getting clean. The majority of people across the street (in County jail) are drug addicted. Addicts are TRAPPED. We need more programs and more people to help put them in a place where they can get clean, not where they stay lonely, depressed and desperate. Instead of jail they need treatment.

Access to Employment

What is their experience related to employment? Able to get a Job? Need training for a better Job? Are there good Jobs close to where they live?

We really try to do our best and get a job. But because the PO says you have to go to certain classes, you lose your job. You feel like my life is over and I can't succeed.

Or you don't have a phone and you can't call in or it broke or you got burnt, you're back in.

I've got a son, and I want to show him a different way.

A mentor could help with employment that's not limited; help guide us to a career that we can have even with a felony.

I feel limited [in job prospects] by my tattoos. [Face/neck in particular]. I really need help with employment, because people look at me and don't hire me.

GLIS is an employment agency, they're felon friendly.

My #1 priority (far using CDBG) is jobs. The #1 thing is to get working.

Show that there are still careers that are felon friendly. Give that hope.

White and Asian owned family businesses look at me, they see a big black guy with tattoos, and they won't hire me, even though I have credentials. They want to hire someone who looks like them.

Access to Low Poverty Neighborhoods

Is the neighborhood safe? Access to good quality fresh food? Sense of community? Other indicators of a healthy mixed income neighborhood? Access to park and recreation facilities? Libraries? Other public amenities?

Drugs and addiction are the problem. (*For lost of the participants have a history of drug addiction and distribution.*)

There's so many trap houses-once you come in, you can't get out.

Access to Environmentally Healthy Neighborhoods

Include anything related to environmental quality, both in the neighborhood and within a home or apartment building (e.g., mold, bed bugs, etc)

Fair housing capacity and resources

Include information about how accessing fair housing resources; if these are working and/or other resources are needed

Section VI Feed Goals and Strategy Recommendations

Example from Westwood group: We need a fund, ora community coop, where we can help each other pay rent when we need help, help each other purchase a home.

——— Moderator ideas/-solutions brainstorm:

■ XXX

Quotes:

Example from Westwood: "We don't want more housing if it is small apartments . We want our children to be outside playing, to be creative, to enjoy nature."

Focus Group/Pop Up Notes

If possible, try to organize your notes by category, to make it easy to scan and incorporate into the AFH.

Section III Feed Citizen Engagement

Group Location/Date/Time/Host

Homeplate At-Risk and Homeless Youth/April 16, 2019/3:00-5:00pm(Homeplate

R/ECAP?

Demos: (approximate to the best of your ability)

of Attendees: 9

by race/ethnicity: 1 African American, 1 Hispanic, 7 White

by disability :

by families w/ kids: 1

by language other than English (and the language)

Attendees: 9

Language: English

Typically under-represented population? At-risk and homeless youth

How recruited: The discussions were held at HomePlate during drop in hours. Interested youth participated and received a \$20 WalMart gift card, a \$10 McDonald's gift card. All youth at the center had the opportunity to create "go bags" with food and hygiene items.

List of organizations consulted:

HomePlate

Section V Feed Analysis

Current Housing Choice

Where they live, experience getting their place to live, why picked location, etc.

I'm not homeless anymore. My family got a two-bedroom apartment for the five of us, plus our dogs and pigs. DHS helped us get the apartment. I went to Southridge Highschool, and I should be off probation by summer. I'm thinking about going into the Job Corps. I have a brother who's a junior at Beaverton and a sister in the sixth grade. DHS pays 70 percent of our rent for a year. For the longest time, DHS wasn't doing anything, then, they decided to help.

We stay at a (youth/young adult) shelter in Portland. The shelters for people, you have to worry about safety. In the Portland shelters, there's drugs, violence, and they're scary.

I've lived in Aloha my whole life.

We (family) used to live in an apartment for \$700. Over five years, the rent went up to \$1,200. We got an eviction. We couldn't afford to pay 1 month's rent, and we were homeless. I think it was also harder because we're weird and don't get along with other people.

A lot of transitional housing programs and shelters don't allow couples, so there's no one to really help us.

There should be better circumstances for the homeless. There should be better, safer shelters. Maybe where they evaluate people before they come in.

Although, sometimes, at the door, people seem nice, and then in the night they start screaming.

The place we stay is self-run, so if you want to be on the staff, you say you want to be on the staff or you do security shifts out front.

At adult shelters, people talk a lot of shit about things they've done. Youth shelters are more calm.

We're distant from adults. Kids need more guidance. I think people 18 to 30 or 25 should be separate from the older, more hardcore people.

I usually stay with friends. They let me crash with them. A shelter is the last resort.

The first time I was homeless, I was homeless for almost a year. I was outside in Beaverton. Beaverton has a squad for bike police that looks for the homeless to bother them.

They should tell the police to back off.

It's illegal to be homeless here (Washington County). They passed a new law, that if you're sleeping in Beaverton, Hillsboro, Aloha, it's illegal. The police are trying to chase the homeless into Portland.

They chased me into Portland. I was sleeping, in a tent, and in the middle of the night a crazy guy literally set me on fire. I have scars all over my back from it.

There's really no place for youth. Safeplace is difficult to get into, and you can only stay until you're 19. Then, you can't stay there.

I'm almost 18, and I'm planning on renting. My grandma will give me a six month lease.

I'm 18. I live with roommates, and I struggle with money.

I live with my folks, for now, but that's changing so on.

I got kicked out, this time for good, and I'm couch-surfing. I have no income since my Mom got me fired from my job. I'm looking into getting money to save to get an apartment and get my life together.

Saving up money for rent is hard. Then, when the rent is due, I don't have the money. I need a loan..... You should go to a bank and talk to a financial advisor. Now that you're 18 you can get a loan.

No one wants to go to shelters or transitional programs. I want to be able to do whatever I want.

My sister's boyfriend has an apartment and he has four roommates and seven people total in a two bedroom. They're getting kicked out for too many people.

I want to get a house so no one has to sleep outside.

I don't want to be alone. I want to live with a group of friends.

I want to be able to do what I want to do and not be judged. But it isn't always that simple.

I looked and found out how much people can pay. I found a place for \$250 because you can share a room. But, I had to pay a second deposit.

Housing is the biggest need for people like us. And trying to find the options for help. Multnomah County is scary and ruthless.

I'm living in Hillsboro with a friend from high school who has his own place. He's cool and is letting me stay there.

It's hard to rent with no rental history. Once you can keep a job, you could get a room in a house maybe and start to build a rental history. Then I can get an apartment. I used to pay my Mom \$200 a month, so I'm used to paying rent.

I'm in really unstable housing right now. I had a baby and was living with his parents and he went to prison. Then I lived with a boyfriend, and have moved around since. My clothes are all in other people's houses. I'm getting evicted from the house I'm staying in now. I want to have enough money to be with my son-my mom has custody-and live on my own.

I aged out of the shelter, so I moved in with roommates. My roommates invited people over, and they fought, and it got physical, and the neighbors complained, so we're getting evicted.

Examples of Housing Discrimination

Include anything that seems like direct housing discrimination

Access to Proficient Schools

Include anything about neighborhood schools/school choice, etc

When school doesn't work out anymore or that you just have so many family problems that school doesn't make sense, you're on your own. You can't get a job, you can't get a GED.

Access to Transportation

How do they get around? Are they able to get to the places they need to go? What challenges do they experience?

Access to Services

Include anything related to health and human services

If you go to Portland, you can ask anyone and people will tell you where to get help and give resources like food. They gave me a street routes book that had all the shelters and resources in it.

I have a felony. Outside/In will help me do a six month class, so that no matter what the felony, I can get a place to rent. The Rent Well program.

We need more one on one help-for housing, jobs, mental health.

Mental health is a big issue. Drugs, bad relationships too.

HomePlate needs to be open longer. Just 2 to 5 is too short. I wish there were more hours. It would be great to be able to come every day. We could get help, just hang out, or have a safe place to sleep for a while.

We should be able to drop in more often, for longer.

We could get more help, a little sleep.

If it (HomePlate) was open 9-5 people really could sleep.

The (HomePlate) Outreach Workers are amazing. With their green backpacks. I met them on a really hot day. They came up and asked if we wanted some water and gave us a card. They were really cool and really consistent.

You can have someone to talk to here.

I like that they approached us. I hate asking for help.

They have activities too. We went on the coast trip. I hadn't been to the ocean in so long.

We need a place that's like the Boys and Girls Club, but for people our age.

At HomePlate, they have compassion, they understand, it's safe, and you can get a shower and get help. We could use more help with housing, food, financial-how to pay bills, save money, get jobs and keep them.

I don't have a lot of experience with the County, but I hope they will be more open. They should be more open because people have a lot of issues and resources they need. Most of my experience with the County has been with the police or DHS. They're a little uptight. I have gotten in trouble with the cops though. I don't think a lot of people know about the County. Maybe if they would come around and talk with us more? I'm pretty hopeless. We don't have outlets, maybe there are resources, but I don't understand what they are.

Access to Employment

What is their experience related to employment? Able to get a job? Need training for a better job? Are there good jobs close to where they live?

I want to get my felony cleared so that I can join the Marines.

I don't have any income. I wish there was a program for maintaining a job. It's hard for our generation, because we just want to do our own thing, so I may be scheduled to work, but I don't go because I want to do something else.

We need mental health and help to get better lives. Especially towards (U)ob) training for the homeless.

We need income and to learn how to maintain a job. I used to work at Taco Bell, but if I want to go out and have fun, I don't go to work.

It's a generation thing.

It's not hard to get a job. You have to work at it, and you have to show up and work.

Because I don't have any work experience, I can't get a job. I've applied everywhere and everyone has turned me down. I know I have to get a job before I can get housing. HomePlate is the biggest resource our group has.

Access to Low Poverty Neighborhoods

Is the neighborhood safe? Access to good quality fresh food? Sense of community? Other indicators of a healthy mixed income neighborhood? Access to park and recreation facilities? Libraries? Other public amenities?

There need to be more family activities in downtown Hillsboro.

Drugs are a really big issue, and hunger, and homelessness. They should spend the money (CDBG) on that.

Access to Environmentally Healthy Neighborhoods

Include anything related to environmental quality, both in the neighborhood and within a home or apartment building (e.g., mold, bed bugs, etc)

Fair housing capacity and resources

Include information about how accessing fair housing resources; if these are working and/or other resources are needed

Section VI Feed Goals 11kt Strategy Recommendations

Example from Westwood group: We need a fund, ora community coop, where we can help each other pay rent when we need help, help each other purchase a home.

Moderator ideas/solutions brainstorm:

- XXX

Quotes:

Example from Westwood: "We don't want more housing if it is small apartments. We want our children to be outside playing, to be creative, to enjoy nature."

Focus Group/Pop Up Notes

If possible, try to organize your notes by category, to make it easy to scan and incorporate into the AFH.

Section III Feed Citizen Engagement

Group location/Date/Time/Host

Sonrise Project Connect/Homeless Connect/April 16, 2019 11-1/Sonrise

R/ECAP?

Demos: (approximate to the best of your ability)

of Attendees: 9

by race/ethnicity 7 White, 2 Native American

by disability 8

by families w/ kids

by language other than English (and the language)

Attendees: Washington County homeless residents participating in shower and meal program. Most of the participants shared that they have an addiction (meth, heroin) and/or mental illness; one had a mobility disability. Ali had a long-time history of living in Washington County, and six of the nine grew up in the area.

Language: English

Typically under-represented population? Yes

How recruited: Program participants were invited to participate in one-on-one or dyad discussions; each received \$20 gift card and could prepare a "go bag" of food, water, and hygiene supplies

List of organizations consulted:

Sonrise Project Connect

Section V Feed Analysis

Current Housing Choice

Where they live, experience getting their place to live, why picked location, etc.

Sonrise Staff perspective: Sonrise operates the County's Winter Shelter; this winter they served 400 individual guests. Significant barrier for many participants is disability and being unable to

work due to the disability. People don't receive enough money from disability benefits to get into housing. There is a mental health crisis, and the Hawthorne walk-in clinic helps with that. Because of mental health issues and addiction, not all people succeed in the same types of housing arrangement. Some really don't do well in shared or group housing. Felons have the most difficult time getting into housing, even if they're working and can afford to pay the rent. CODA, the main detox in the region is located in Portland. CODA has programs in Washington County, but not detox.

Guest perspectives-

I got kicked out of my house, and someone else moved in. It's my Dad's house, but I'm not allowed to live there, because of the nature of restraining orders. I have a camp. I grew up in Oregon, so I know how to camp. The best housing situation for me would be a rural community, with not a lot of people around, because of the voices. I need someplace quiet. I was raised by Native people, and I know how to live.

I've been homeless for a year, living outside.

I've been staying in a car since July.

I have to live alone. Before I lived in the car, I had a good spot, but the people next door wanted to blast the TV all the time, and I could hear everything through the shared wall. I couldn't take it.

I went to high school here. I need a place to go to get self-sufficient. But I'm afraid that if I get housing, I won't know what to do. I'll lose it. I think I'll need help learning how to be independent. With my camp, I don't have any responsibilities. I can get by, and I know how to do it.

In Portland, this would be so much harder. Here I can go places to charge my phone. Here (Washington County), it's safer and more comfortable. It's where I grew up after 3rd grade. I'm not sure how big the problem is out here, but there are a lot of homeless in Hillsboro.

I used to have money and I lived in Hillsboro. When I settled my worker's comp, I could pay my lease, but that money ran out. I could barely pay my lease, my truck, Comcast, and insurance, so I lost the place. I'm on disability now, so I can't actually do anything, or I'll lose that. I live in my truck, because my truck payment is \$500 a month. I get \$724 on SSDI, but they take out money for Medicare Part B so I really only get \$567. Don't get me wrong, disability (SSDI) saved my life, but I'm suing the state over my worker's comp. I can't work, and I need to focus on my lawsuit.

There are no easy answers. I came here a few weeks ago, desperate. I wasn't looking for anything, but they gave me a prepaid gas card. It was a miracle. Having access to that \$20 gas card; I broke down crying, you can't believe how much it helped. It was what I needed more than anything.

I like to say I'm homeless on purpose. I got a divorce, and I've just embraced being homeless. I am comfortable in the woods; I have no ties. I don't think I could handle living inside. When I

had a job, my wife paid the bills. What I would need would be a place in the community that would do all the paperwork. They could take my check and pay the bills for me, and I could just eat there and sleep there. They would do it for me.

People who know me know where I'm at. So if they want to talk to me they come to my camp.

When I got out of the army, I went to stay with my sister in Portland. She was on meth. I'd never even flirted with it, but then I did and that was that.

I'm a felon. No matter what you've done, you're still not done paying. I can't get work. I can't get housing. No one will rent to me. After a certain amount of time, the conviction should come off your record. Maybe not for people who murder, but most of those never get out. And not people with sex assaults or kidnapping. But other convictions, they should come off your record after some time. You have no idea how much I want to work.

I was in sober living for a while. Then, I don't know what happened, I went out and got drunk. I've been on the streets for five months. Both me and my wife are felons, but she got a place in a house out in Tigard, but I can't stay there. There aren't any places where me and my wife can stay together. I've thought about calling Community Action for help. Unless it's a personal reference, no one will rent to us. Someone has to rent a personal house to us.

I was supposed to sign up at TPI (Transition Projects in Portland) for housing, but I got pissed about losing a job, so I just said, 'fuck it' and went to the woods. I don't see recovering from this. I thought I'd retire from doing gutters, but now I can't even work. I get so sick if I don't use.

I wish I could live someplace quiet, a little boathouse somewhere. I could play my guitar.

I've been living in my car on and off since 2013. I don't walk well and I'm in severe pain. I should have a wheelchair or a walker, but they don't fit in my car. So I make do with the cane and being in pain. I was renting a house in 2007 (in Beaverton area), and my roommate decided to keep living there but stop paying rent. I couldn't make him pay. One day I stepped into the shower and the whole floor of the shower was covered in baby oil. I slipped and almost died. I know my roommate did it. The landlord evicted him, but I couldn't pay the whole rent alone, so I ended up losing the house. Getting evicted. That started me living in my car. After a while, in 2013, I went home to family in Boston, but that didn't work out. Then, I got into transitional housing in Boston, after two years, my time was up and I had no where to go. So I bought a motor home and drove down to Florida. I traveled and stayed in my motor home, but I couldn't afford to camp. I found a free campground in Nebraska, but that closed. So I got back to Portland in July 2017 and my motor home broke down, so I got a car. In February 2018 I got a place with roommates. After four months, I got notice that I had to leave so the girl's brother could move in. So, I'm back to my car.

I need housing with no stairs. I need an apartment, but I need one with a subsidy because I'm on disability. The waiting lists are so long. I've been on the project-based list for six years. There needs to be more housing for people with disabilities. If I can't work and I'm on disability, I can't be living in the woods. I should have a wheelchair.

Examples of Housing Discrimination

Include anything that seems like direct housing discrimination

Access to Proficient Schools

Include anything about neighborhood schools/school choice, etc

I wish there were resources for children, like afterschool programs for kids. I've been here (Washington County) for 27 years. My kids went to these schools. I think any money the County gets should go to the kids who need it most. Afterschool programs.

Access to Transportation

How do they get around? Are they able to get to the places they need to go? What challenges do they experience?

Bus service is ok. I can pretty much get where I need to go.

I'm blessed; I have my truck. Gas is what I need.

Access to Employment

What is their experience related to employment? Able to get a job? Need training for a better job? Are there good jobs close to where they live?

I fly a sign on the ramp. I do ok. Yesterday a guy gave me \$100! I couldn't believe it. I'd like to work, but no one will hire me. I used to be in construction, but I got hurt, so I don't really know what I can do. The weather's good today, so I'll go to the ramp.

Before I get a place, I have to get a job. Getting a job isn't that hard, it's keeping a job that's a problem. I had a good job at Burger King, but I couldn't find a place to take a shower, and they eventually had to let me go because I smelled and wasn't clean.

Unpredictable stuff comes up that ends up in losing a job. I had a job that was working out, but one night I slept using my backpack as a pillow, and my toothpaste went all over my only clean clothes. So I couldn't go to work the next day because my clothes were covered in toothpaste. I lost the job.

To get a job, you have to have a phone, and you have to charge your phone. Sometimes I feel like I spend all day charging a phone. And, with online applications and everything, it has to be a smart phone. Sometimes the Obama phones just break and you're out of luck.

I used to deal cards. I made a really good living, but then they changed the law and I couldn't deal cards any more. So now, the only place I can work is Vegas. I've applied to a few places, and if I get that job, I can go down and make all the money I need to start over here.

I'm a graphic artist by trade, but my business crashed in the recession. So, I started driving a semi. I slipped on a dock and tore up my wrist, and it was a big worker's comp issue. Worker's comp didn't pay for time lost, I needed several surgeries, and finally settled worker's comp.

I had a job. I wanted to do it. But then everything fell apart and I went off the grid.

I'm a canner now (collects cans for \$). I'm a dumpster diver. I've always worked, but I've lost jobs because of differences with people. Now, I'm a scavenger.

It would be great if the County money (CDBG) could help start DIY businesses.

Access to Services

Include anything related to health or human services

I've been on supervision for three years in Washington County for meth. I was in a recovery farm for 70 days, then I went to a clean and sober home. But everyone there was using! So now, I camp.

You can go to LifeWorks for help or CODA With LifeWorks, you have to be on time, every time, or they won't help you anymore. They'll talk your ear off even if you have PTSD. I've never been to CODA

Really need storage for my things so that I could get a job. Everything I have is in these two backpacks. There need to be more places to take showers more often.

There's Open Door-it's open four days a week, and it's just an open door policy. Anyone can go there. Down here (Sonrise), it's more cultured. There are rules.

I don't qualify for any help. I'm young, I'm healthy, I'm not addicted to anything, I'm not a felon, I'm not a veteran, I'm a man, I don't have kids. There is literally no help that I qualify for. I don't have a family; they're all dead. All I need is a month off the streets, where I can shower every day, have a place to sleep, and can go to work. I could earn enough in a month for a deposit and I could get a place. I just need a month of help.

Resources are spread all over the place. I wish there was just one place to go to get everything.

For me, gas would be most helpful. If I have gas, I'm OK, because I live in my truck. I'd also like access to places to bathe, more than once a week. I signed up for SNAP; I didn't want to, but I had to. The Oregon Food Bank here should be shut down. When you get rotten or almost rotten food from them, eat it because you're hungry, and then you get sick. It's awful, especially since I don't have access to a bathroom. You don't want to be sick and not have that.

Phones are really important. I used the Brookwood Library (Hillsboro) to get on the Internet for job applications and information.

It's really hard to find doctors that take Medicare. OHSU (the med school) is the best resource to see a doctor or a dentist. They're students, but they'll take care of you.

There's a place behind Intel, the ORHS office, and that's where I applied for a SNAP card.

My advice would be for people to not hesitate to ask for help. I wish I would have asked for help so long ago. I've never even gone to the VA. I haven't taken advantage of VA benefits.

People don't come in from the woods. Maybe if you did something fun in the woods, like a small concert, or had hotdogs, make some noise, then maybe we would come in, and you could offer help.

Access to Low Poverty Neighborhoods

Is the neighborhood safe? Access to good quality fresh food? Sense of community? Other indicators of a healthy mixed income neighborhood? Access to park and recreation facilities? Libraries? Other public amenities?

We're people, so I wish we were treated like people. Instead they judge us. I wish everyone had the attitude that we're all just people. To respect each other. I came here to pick up my guitar, and here (Sonrise), they treat me like a person. Like I'm a part of the community.

I think the County is on the right track with how they help the homeless. They pay attention.

The police are always looking for the homeless. The cops pull up on me for sitting in the truck. In some places, churches can have people stay in a parking space for up to 90 days. That would be safer.

Access to Environmentally Healthy Neighborhoods

Include anything related to environmental quality, both in the neighborhood and within a home or apartment building (e.g., mold, bed bugs, etc)

Fair housing capacity and resources

Include information about how accessing fair housing resources; if these are working and/or other resources are needed

Section VI Feed Goals and Strategy Recommendations

Example from Westwood group: We need a fund, or a community coop, where we can help each other pay rent when we need help, help each other purchase a home.

Moderator ideas/solutions brainstorm:

- Best practices for safe storage of belongings
- Expanded shower options (increase days of week, hours of service)
- Short term transitional housing-get on your feet program, not geared to those with more severe barriers to stability, but to people who just need 30 or 60 days of a safe, predictable place to sleep and eat while working to earn deposit and secure housing

- Get a better understanding of current status of outreach when winter shelter is not in operation. Access to addiction services? Crisis and on-going mental health management?

Focus Group/Pop Up Notes

If possible, try to organize your notes by category, to make it easy to scan and incorporate into the AFH.

Section III Feed Citizen Engagement

Group Location/Date/Time/Host

Sequoia Mental Health / April 17, 2019/3:00-5:00pm/ Sequoia Mental Health Services

RECAP

Demos: (approximate to the best of your ability)

of Attendees: 10

by race/ethnicity: 10 White

by disability:

by families w/ kids: All single individuals

by language other than English (and the language)

Attendees: 10

Language: English

Typically under-represented population? People with psychiatric, emotional and developmental impairments

How recruited: The discussions were held at Sequoia Mental Health Services - Clinical office during drop in hours. Interested adults participated and received a \$20 WalMart gift card.

List of organizations consulted:

Sequoia Mental Health

Section V Feed Analysis

Current Housing Choice

Where they live, experience getting their place to live, why picked location, etc.

I live in a great apartment. I've been at Spruce place for 8 years and I was able to get into my home with the help of my advocate.

I'm living at Tri-Haven and it's sometimes loud because of the people and the way the rooms are next to the tv. I wish I had my own place where I could just close the door and it would be

quiet. My advocate is trying to find me a new place, but it will take time. It's better to take the time than be out on the street.

My place is too big. I have a two-bedroom unit and that is all they had. I need a smaller place, but all the one bedroom units are taken.

The application process is too rigorous. Too many steps at each place. Doing it once would be easier to understand.

Examples of Housing Discrimination

Include anything that seems like direct housing discrimination

Discrimination wasn't specifically noted. Ali have found current housing through their case manager.

Access to Proficient Schools

Include anything about neighborhood schools/school choice, etc

Schooling was not addressed by this group

Access to Transportation

How do they get around? Are they able to get to the places they need to go? What challenges do they experience?

My case worker takes me different places, but if I want to go on my own then I can take the bus.

Sometimes the housing is way out in the rural area. The bus line to Forest Grove is spotty and makes it hard to access services and appointments

Being too far away from services makes it hard. Sequoia helped me get into my apartment and they make sure some of the meetings and sessions are close by

Access to Services

Include anything related to health and human services

We need to have some type of life skill training. Like, how do we keep our house clean and what should we use to clean it

It's hard being alone. Maybe if there were companion services or more community events. I'd like to have a pet with me.

I really need my case manager. She's really great and helps when I don't understand or can't get somewhere

Compassion. I just wish everyone would give me a chance.

It would be nice to find housing/services without having to go to the hospital

Access to Employment

What is their experience related to employment? Able to get a job? Need training for a better job? Are there good jobs close to where they live?

1 can't work right now and get SSI

It's tough to keep a job and stay sober

Access to Low Poverty Neighborhoods

Is the neighborhood safe? Access to good quality fresh food? Sense of community? Other indicators of a healthy mixed income neighborhood? Access to park and recreation facilities? Libraries? Other public amenities?

The section 8 wait list is too long. It's too big for people like me to find a place to live without losing hope

Need to have more choices on where to live

Hard to find a place when you have a lack of rental history

Access to Environmentally Healthy Neighborhoods

Include anything related to environmental quality, both in the neighborhood and within a home or apartment building (e.g., mold, bed bugs, etc)

Can't lump together mental health and substance abuse people, it's not healthy for us to have them combined because we each have different needs and conditions

Need to make sure that background checks are done so it stays safe

Fair housing capacity and resources

Include information about how accessing fair housing resources; if these are working and/or other resources are needed

Not sure where to go for help, 1 rely on my friend for information

1 rely on my parents/family for finding out who can help me

1 google it.

Quotes:

Example from Westwood: "We don't want more housing if it is small apartments. We want our children to be outside playing, to be creative, to enjoy nature."

We are people too. Sometimes we get taken advantage of and we just want someplace safe.

Introduction:

Department of Housing Services facilitated a meeting of affordable housing developers within Washington County to receive feedback on the first draft of the County's Local Implementation Strategy. The meeting included an overview of the Metro Bond, unit production targets, key components of the first draft of the County's Local Implementation Strategy, as well as a timeline for revision and approval of the document. Developers were then divided into three smaller groups to discuss three key pieces of the Local Implementation Strategy: permanent supportive housing, advancing racial equity, and project selection criteria. Feedback from each of those small groups is listed below by area.

Permanent Supportive Housing (PSH)

Challenges Group 1

Screening People into PSH

- Not able to check arrest records (LIS p. 5)
- How do we intake people with sex offences, Illegal drug activity, SPMI that is untreated?
- Housing first – house everyone?
- Risk Mitigation Pool or risky tenants
- Priority populations for PSH: older w/ disability, developmental disabilities, high needs SPMI
- Standards not eclipse landlord tenant law
- Carve out for sponsor to work with violent people with offender history
- Racial equity training at property screening/management

Operations

- Will LIS provide target housing? All SPMI, drug/alcohol housing, etc?
- Service dollars – sustainable? LIS p 19 Count HHS and Partner – more specific if possible
- Service sustainability period such as 15 yrs, 30 yrs, 60 yrs, so 15 years for services and 30-60 years for sticks and bricks
- Definitions of services

Priority for PSH Units

- 226 units tri-county for homeless
- <30% units for general population – who provide these services (non-homeless)

Challenges Group 2

Screening People into PSH

- Should PSH restrictive rights be 15 years and not 60 years?
- Need more services to manage tenancy supports
- What is County planning for PSH screening criteria? Eg landlord vs homeless system “Housing First”
 - Arrest records (LIS p 14)
 - Support criteria – service money from County
 - Sex offender – can consider
- Can treatment be required?
- Risk mitigation for high need populations

Priority for PSH Units

- 226 units tri-county in Equitable Housing Plan
- Referral process?
- PBVs –

Multifamily Affordable Housing Developers and Owners LIS Input Meeting
May 15, 2019

- what is allocation? Is it 8 per site (on p 5) or is there another limit? Spell out
- If no limit to PBVs can more bond funds be allocated to pay for Davis-Bacon prevailing wages?

Social Security # not check

- Racial equity lens: do not ask
- Training for intakes to ensure equity
- Applications in multiple languages
- Call out the denial to appeal/reasonable accommodation process

Operations/Service Funding

- P 19 does not talk about how
- Without flexible funds, how?
- Can't expect provider/partners to cover costs
- How will this be monitored by the County once in housing
- Sustainable service dollars are needed
- Rules v Sustainable funding are two separate w/o commitment
- Integration with funders demands (banks, state)

Challenges Group 3

Screening People into PSH

- Screening from lens of Housing First is Landlord v Homeless System
- LIS does not clarify if bond can be used to build site for specific population like SPMI
- Does LIS preclude or require?
- Create Mitigation Pool/Fund
- Align decision and definition of Tri-County plan on PSH
- Connect with Tri-County report
- Align definitions of PSH, Residents Services, Homeless or create more flexible county definition (?). Is this possible with PBV?
- Residential screening Criteria should be no more strict than department of housing services low barrier criteria

Services funding

- Where does the money come from to sustain the project, eg 15 yr, 30 yr, 60 yr
- PDX Bond language for 30% units, if no services and _____ convert to 30% non-PSH
- Incentive or RFQ to make it happen
- P 19 on county HHS and provider partnership is vague

Operations

- Operationalize/Priority populations in PSH unit complexes
- Resident services on site
- LIS definitions on resident tenancy, client services, treatment
 - Who will fund?
 - Transportation? Navigation?
- 226 units in Tri-county for "Homeless"
- Priority for all PSH populations based on acuity
- Coordinate entry with Community Connect
- Will there be a required number of PSH units per project?
- Can we house people who self-identify as homeless or in need of PSH?

Advancing Racial Equity

Challenges Group 1

Screening Criteria

- Criminal history – are felonies included? Maybe including PHA Plan definition
- Look at nuance of eviction or all evictions. Don't screen out if a tenant just can't make rent. Help property managers get more information.
- Nuisance crimes – when people are stabilized they are fine, such as with mental illness. Partner with LifeWorks and Sequoia
- When thinking about policies, where there is a life/safety threat, don't layer on more obligations. It effects other tenants, such as people who attack with weapons don't belong in buildings
- Screening criteria – low barrier pre-qualification process

MWESB/Equity

- The 10-20% MWESB criteria is an easy button that misses the target. The people who need help are the low income ones who need training for a trade. Push more toward workforce than the business ownership
- Concerned about meeting the 20% goal since the tri-county region will be spread thin
- Think about professional services and the specific workers
- GCs don't do the work, the subs do. Subs can walk away due to red tape
 - PHB requires workforce training and adds costs to all sub projects, not just the PHB projects
- Certified payroll can work...
- Labor, materials, and equipment could be included to meet the goal, and services, not just the construction workers portion
- Smaller subs could have a continuing training so they could be more productive on a smaller scale
- Wealth and capacity building in minority communities. Reflect in partnerships to meet the goal. Property owners can bring that benefit to the community and create a larger path.

Challenges Group 2

MWESB/Equity

- 10-20% criteria: in PDX they say anything over \$300,000 in a project needs to be MWESB
- 20% is do-able but also need to work on workforce development They spend money buying subs off of other jobs
 - Professional services and contractors are where competition is
 - Need our own pool of contractors
- Getting people qualified to be a subcontractor is needed. The pool is too small. They also need to be aware of the pool. Subs may already be out there and need education and awareness process to make them aware of opportunities
- CPAH set a 30% MWESB goal for their next two projects that are still ramping up. They think they can get there.

May 15, 2019

- The MWESB process is hard to get registered for, the paperwork, etc. A business self sufficiency person at the County, possible, could help this.
- Also, people do have fear even if they are legally in the US
- Homeownership is a key to racial equity. Mobile home parks, too. Specifically call out as a key for racial equity. Call out conversion of mobile homes parks as a homeownership policy.

Screening Criteria

- Limit SS# from screening process
- Can we say undocumented people can live in the Metro Bond housing since no HUD or RD funding is being used? This bond funding is more flexible and we can create opportunities.

Challenges Group 3

MWESB/Equity

- What are the mechanisms for accountability later with contractors who have experience and can meet goals vs those who say they will?
- Certification for businesses is hard. Self-certification to report – she would ask everyone
- Make the % goal informal, ask if the subs/contractors intend to be certified and encourage or incentivize to do so
- Get a meeting with contractors to ask about the % goal
- Innovative Housing used MCIP in PDX to access the subs to access minorities to convince them to bid. It is also relationship building. Get help from culturally specific organizations to access the minority owned businesses.
- Have a line item in the budget for MCIP (for example)

Screening Criteria

- May need looser criteria that is appropriate to the population.
- Integrated communities concept tries to get away from segregating populations
- Do we need to mitigate projects with mixed incomes and populations?
- Community Action has a hard time imagining integrating the PSH population with other populations
- Physical or health related issues are different than SPMI population (Severe and Persistent Mental Illness)
- Innovative Housing has done 1BR units for individuals; now they are housing families. Struggling with relaxed criteria that screens out felons and sex crimes because families need to be protected
- SPMI, or SPMI + drug use or SPMI + _____, these are all different
- Innovative Housing is partnering with the Hispanic Council in Astoria during the design phase of a project. Also contracting with them during lease-up. Hispanic Council is their advocate. This is a nice model and needed in the Metro Bond. Bienestar likes this model, too.

Project Selection Criteria

Challenges Group 1

Workforce Development

- Critical to bring people into the trades
- Adds cost
- Need to bring in new subcontractors to this type of construction
- Dollar amount vs. percentage goal. Goal for achieving this should be based on the full leverage of Metro bond funds – the total development cost of a project. Also look at the number of people who are provided an opportunity to work in the trades.
- There is a shortage of workforce and that varies throughout the region
- Work toward this goal should be evaluated at milestones in the Metro Bond implementation timeframe.

Nonprofit Preference

- Are you really trying to get at providing a preference for local developers or CHDOs (Community Housing Development Organizations)?
- There is a difference in mission between nonprofit and for-profit developers. Nonprofits more likely to reinvest profits and have different profit margins.
- Is there still a nonprofit capacity issue with all the bond resources that nonprofits need this advantage?
- What is the County trying to achieve with this preference?
 - Local reinvestment of project cashflow?
 - Investment in services?
 - Provision of resident services?
- Don't forget that existing service providers are providing services already to some of the people who will be housed. They are doing it with existing resources (e.g. Medicaid).

Universal Design

- Providing backing for grab bars is low cost universal design element.
- Universal design is better/less expensive than addressing it after the project is built through reasonable accommodations.
- Universal design allows for longevity/support for tenants as well as sustainability.
- Design should be well-fit to special needs population as needed. This depends on the target population for a project and should be tied into community engagement work for that project.
- Balance of cost of construction with durability of the projects.

Challenges Group 2

Workforce Development

- County should identify partners – create a flow of individuals
- Will there be reporting required? How will a project or developer or the County know it is achieved?

- It is important to look at the track record of a contractor and be aware of differences within the region.
- MCIP and Best HQ can be resources.
- County should coordinate training around COBID to help contractors and subcontractors certify as MWESB in advance of developments so that it doesn't slow down individuals projects (and inadvertently add cost).

General

- Make project selection criteria more specific and based on a pool of projects competing for funds rather than a particular scoring scale or rubric.
- Link Permanent Supportive Housing report to the Metro Bond.
- Time vs. production – will you have a certain percentage of bond funds set-aside for fully-funded projects that can move forward more quickly, and also retain funding for projects needing competitive gap funding?

Universal Design

- Are you intending to prioritize buildings with elevators? This could limit projects to more urban design and locations where that design is a good match.
- Universal design should promote creative design based on site constraints.
- Add in low-cost/no-cost universal design features
 - Tub/shower enclosure that can support future grab bar installation
 - Grab bar reinforcements
- Important to have appropriate marketing to connect accessible units with households who need them.

Challenges Group 3

Workforce

- County should consider the contractor's track record in achieving this.
- County should take the lead on helping subcontractors qualify as MWESB.
- There is a need for established apprenticeship programs (State of Washington has this).
- Metro has started Construction to Career Pathways program – the County should be involved with it.

Nonprofit Preference

- Establish a unit target by MFI level set-aside for nonprofits. Nonprofits don't want to have to provide all the 30% MFI units while for-profit developers produce those targeted for higher income households.

Universal Design

- Construction costs are now as high as \$200/SF, every requirement adds to it (like universal design). This limits the number of units that can be produced.
- Need to understand which items have the most value and where the most cost savings can be had vs. having to retrofit units later.

May 15, 2019

- Important to consider those items that allow tenants to age in place – colors, door handles, wayfinding signs

General

- Clarify the RFP/NOFA process for Washington County identified sites. There should be an RFP process for high opportunity sites. Developers don't want to inadvertently compete with the County on purchasing sites.
- There should be an option for mixed-income housing.
- When the County does acquire a site, it should complete any zoning changes needed before issuing an RFP for the site.
- Streamline the RFP process.
- Consider funding ADUs (Accessory Dwelling Units) that can be added to lots as a duplex or quadplex.

Metro Affordable Housing Bond – Washington County Local Implementation Strategy Draft 1 Outreach to City Councils – May 2019 – Feedback Summary

Introduction:

During the month of May 2019, the Department of Housing Services staff presented to each city council with the Washington County Metro Bond implementation area. The presentation included an overview of the Metro Bond, the unit production targets for Washington County, key components of the first draft of the County's Local Implementation Strategy, as well as a timeline for revision and approval of the document. The slide deck from those presentations is included at the end of this summary.

***Cornelius City Council* – Meeting May 6, 2019**

Questions:

- How many people will be housed with those units?
- How will the lease-up process help ensure that people who were a part of the community engagement process for a project have an opportunity to live in the housing once it is built?

Comments:

- We would like to see more affordable housing in Cornelius, especially for families.
- The city has a large Hispanic population.
- The city is growing.

***Sherwood City Council* – Work Session May 7, 2019**

Questions:

- How does 30%, 60%, 80% MFI compare to what a person earns working full-time at minimum wage?
- What other community outreach have you done?
- How many units are targeted to serve households at 60% MFI?
- How will you make sure the units are built efficiently?

Comments:

- Affordable housing is an important need.
- It will be important to determine a funding source for the supportive services before people move into this housing that will be built.

***Forest Grove City Council* – Meeting May 13, 2019**

Questions:

- How does 30%, 60%, 80% MFI compare to the method used to determine whether a family qualifies for free/reduced lunch?
- How will these funds help existing affordable housing that does not have enough resources to complete needed maintenance and repairs?
- In a rehab project, who owns the project once the work is completed?
- How does Project-Based Section 8 work?
- Do you think much funding/projects will come to smaller jurisdictions like Forest Grove?

Comments:

- Half the school population qualifies for free/reduced lunch. There is a lot of need for affordable housing here.
- Adelante Mujeres, Centro Cultural, and Virginia Garcia Medical Health Clinic are all good resources in Forest Grove for the County to work with on this.
- Affordable housing is an important need throughout the region and the state, as well as in Forest Grove.

Tigard City Council – Meeting May 14, 2019

City of Tigard staff prepared a memo in advance of the meeting outlining their recommendations for revisions to the draft Local Implementation Strategy. That memo is attached.

King City Council – Meeting May 15, 2019

Questions:

- When is the right time to be talking with the County about potential projects? How early is too early?
- Are there environmental review requirements for Metro Bond projects?
- When will funds be available?
- Can Metro Bond funds be used to purchase sites?

Comments:

- We have supported this bond and think it is important.
- There are only two lots of land available in current city boundaries. Their city is built out so they have to build in the UGB.
- The City is interested in developing a mixed-use project in the new town center area (land recently brought into the Urban Growth Boundary), that would include affordable housing, along with a library, and possibly a new City Hall and TVF&R facility. The Cornelius Library project is a good example of what they would like to do. This property still must be purchased and go through a Master Planning process.

Tualatin City Council – Work Session May 28, 2019

Questions:

- When does Tualatin enter conversations with Washington County for what kind of assistance can be offered for projects they are interested in?
- Is there an application cycle for Washington County bond funds?
- How would it work to acquire existing properties and do they have to be privately owned?
- Once LIS is in place, does Washington County screen them or is it metro, or the Housing Authority? Who says yes to a project?
- Is Washington County expected to have harmony between the Washington County strategy and the Metro strategy? If a project meets the Washington County LIS will it also meet Metro's requirements?
- Will the Housing Authority purchase buildings and operate them?
- Would Housing Authority maintenance costs come from the Bond funds?
- Are Project Based Vouchers an annual allocation or in perpetuity?
- What if funds are not deployed in 5-7 years?

- Will Washington County purchase land to develop with a non-profit or are we only interested in existing buildings?
- How is the waiting list generated for those who wish to rent?
- What kind of outreach will be done with respect to various languages spoken? There are 47 languages spoken in the Tigard/Tualatin schools.
- If Tualatin builds 200 units who gets priority for those units? How is the criteria for entry laid out so it's an equitable process?
- Will some units be for people on disability?
- Tualatin has a plumbing/trades school. How does Washington County encourage partnerships with organizations like that?
- Tualatin has just opened a day center for homeless families. Does Washington County know these programs?
- Does Washington County anticipate sticking to the schedule presented or is there slipping anticipated? Developers they are talking to are waiting on the LIS. When does Washington County anticipate publishing the final LIS?
-

Comments:

- They have three possible projects/project sites

Durham City Council – Meeting May 28, 2019

Questions:

- Staff were asked to clarify the role of the Cities of Beaverton, Hillsboro, the Housing Authority and the bond program implementation.
- Is the Metro Housing Bond a new approach for the region or is it tied into existing housing efforts?
- Is there an estimate of the number of needed housing units for Washington County?
- Who are the underrepresented populations in Washington County that are targeted in the Community Outreach Plan?
- How will the tax credit program will work? Do tax credits follow the tenant as they move to different housing? How does the new tax credit program worked with Section 8 Housing vouchers?
- What comes after this program expires in 5 years? Will there be a request to renew it? How will the projects and programs continue?
- How will the funds would be dispersed throughout the jurisdictions in Washington County? What factors will be used to site housing in the various jurisdictions. Are areas targeted for affordable housing development?
- This program covers 10% of the affordable housing need in Washington County. How will the remaining 90% of need will be addressed?

Comments:



City of Tigard Memorandum

To: Honorable Mayor Jason Snider and Tigard City Council

Cc: Komi Kalevor, Director, Housing Authority of Washington County
Shannon Wilson, Housing Authority of Washington County

From: Schuyler Warren, Associate Planner

Re: Washington County Draft Local Implementation Strategy – Metro Bond

Date: May 8, 2019

The purpose of this memorandum is to provide staff comments on the draft Local Implementation Strategy (LIS) for Washington County. The LIS guides the use and allocation of funding to Washington County from the regional affordable housing bond passed by voters in November of 2018.

Comment 1: Homeownership

The strategy needs stronger language around affordable homeownership. Throughout the document, the focus is on rental, with little attention given to ownership. Page 3 includes the following introduction:

“Housing developed will primarily be regulated affordable rental housing units, with the potential for regulated affordable home ownership units.”

Recognizing that the income targets for the bond money will necessitate rental units for the lowest income bands, the targets for higher bedroom counts present an opportunity for affordable homeownership for families. Additionally, there will likely be significant competition for state subsidy to match bond dollars, meaning that bond dollars might be better spent in some cases on permanently affordable homeownership models that can utilize alternative subsidy and finance models to deliver units. Further, if the county is to truly follow the principles of racial equity as outlined on page 5 of the draft, then the history of racial segregation, redlining, and unfair lending practices that have disenfranchised minorities of the opportunities and wealth-building inherent in homeownership must be acknowledged and should begin to be at least partially rectified through this bond. None of these historic practices are mentioned or addressed in the section on racial equity for their contribution to the disproportionate minority need for affordable housing. While rental housing is important, it will not fully address the long-term ramifications for minority families of being excluded from the real estate market. Some level of commitment to addressing these issues is warranted. Finally, middle housing developments have been identified as a regional priority by Metro and many of the jurisdictions of Washington County. Regional bond dollars should be spent at least

partially to demonstrate the viability of this regionally-prioritized housing type to help fill the gap in affordable homeownership. This is in line with the comment received on page 9 seeking “equitable distribution of housing in mixed-income areas with broad geographical dispersal.”

City of Tigard staff recommend the following:

- **Address contributing factors to lower minority homeownership in racial equity section.**
- **Acknowledge regional priority for middle housing.**
- **Include targets for ownership units in the “Framework Unit Production Targets for Washington County” table.**

Comment 2: Flexible Allocations

City staff have some concerns about the operating principles agreed to by Washington County and the implementing jurisdictions of Beaverton and Hillsboro on page 4. The two entitlement cities each have an earmarked amount to allocate to developments within their jurisdiction. However, the following language makes those amounts flexible:

“Second, each jurisdiction will have autonomy in project selection, commitment of bond resources, and oversight of bond funded projects. The jurisdictions may choose to collaborate on specific projects that will serve their individual as well as collective community needs. This may result in actual expenditure of the bond allocations across the three jurisdictions in a different blend than envisioned at the outset.”

While some flexibility is warranted given that it would be difficult to spend the exact allocation amount in each implementing jurisdiction, the language in principle number 2 is overly broad and does not provide a guarantee that Beaverton and Hillsboro have an upper limit.

City of Tigard staff recommend providing a specific flexibility target for each jurisdiction that cannot be exceeded.

Comment 3: LIS Revision

The LIS includes a provision for review and revision of the LIS after 18-24 months and 48-60 months. Page 10 includes the following language:

“...the review process will include community outreach and engagement, review and amendment by the Washington County Board of Commissioners, and submission to Metro’s Community Oversight Committee for review and approval.”

This language does not specifically include outreach to the non-implementation jurisdictions.

City of Tigard staff recommend including specific outreach and collaboration with non-implementation jurisdictions in any review and revision of the LIS.

Comment 4: Tigard Affordable Housing Targets

Affordable housing need figures are identified in a table on page 11. Locally identified need figures were not included for Tigard. The Southwest Equitable Housing Strategy (2018)

identified the following need in just the Southwest Corridor area of Tigard (along the planned SWC light rail alignment):

- 730 constructed
- 850 acquired or converted
- Total: 1,580 homes

Based on these figures, the actual need throughout the city is much higher.

City of Tigard staff recommend including the housing need identified in the Southwest Equitable Housing Strategy as a baseline need, acknowledging that citywide need is far higher.

Comment 5: Metro Acquisition Funds

One of the identified factors for evaluating potential projects (page 12) is land availability and cost:


***Land Availability and Cost.** Buildable land that is also appropriately zoned and offered at a fair market price will be a high priority factor in determining the location of an affordable housing development. However, donated land meeting other factors will receive a very high priority.*

This factor does not specifically give weight to county or local jurisdiction coordination with Metro on land acquisition, using the funds earmarked from the bond for that purpose.

Further, the section on the Metro acquisition program (page 15) states that the county will coordinate with Metro on identification of potential sites, but does not specifically state how local jurisdictions may participate in that process.

City of Tigard staff recommend:

- **Including identifying the ability for the county, developers, and local jurisdictions to coordinate for property acquisition with Metro as an evaluation factor.**
- **Include language affirmatively coordinating with and including local jurisdictions in the identification process for potential Metro acquisition sites.**



Washington County Affordable Housing Bond Local Implementation Strategy

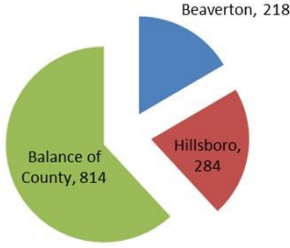
City Council Presentations
May 2019

Komi Kalevor, Executive Director
Shannon Wilson, Housing Development Coordinator
Housing Authority of Washington County

Metro Regional Housing Bond (Measure 26-199 and Oregon Measure 102)


- \$652.8 million in bond proceeds to be used in Washington, Multnomah, Clackamas (area within the UGB)
- In Washington County – \$188 million for housing projects; target is to build or acquired 1,316 units of regulated affordable housing in the county between 2019–2026 (5–7 years)

Units to be Produced with Metro Bond



Location	Units
Balance of County	814
Hillsboro	284
Beaverton	218

5/15/2019 Slide 2



Metro Housing Bond Framework in Washington County Bond Area

- Leading with Racial Equity and Community Engagement
- 334 units (in Washington County) serving households at or below 30% Median Family Income
- 407 units for families (2+ bedroom units)
- Up to 81 units created serve 'workforce households' earning 61–80% Median Family Income

Household Size	30% Median Family Income	60% Median Family Income	80% Median Family Income
1 person	\$17,100	\$34,200	\$45,600
4 people	\$24,420	\$48,840	\$65,120

Source: HUD.gov accessed on 9/10/2018

5/15/2019

Slide 3



Local Implementation Strategy

Key Features of LIS

- Each implementing jurisdiction develops their own strategy
- Outlines how the jurisdiction envisions achieving its unit production target
- Four guiding principles
 1. Housing development plan, including criteria and selection process for projects
 2. Strategy for advancing racial equity throughout implementation
 3. Engagement report summarizing how stakeholder input shaped development of the strategy
 4. Plan for ongoing community engagement

5/15/2019

Slide 4



Key Features of LIS

- Each Implementing Jurisdiction develops its own strategy
 - Autonomy
 - Collaboration
 - Coordination
- Each Implementing Jurisdiction has a unique strategy
 - Land Availability
 - Local Development Partners
 - Major transportation and economic corridors
 - High Opportunity Areas
 - HUD -Qualified Census Tracts (QCTs) and Small Area Difficult to Develop Areas (SADDAs)

5/15/2019

Slide 5



Guiding Principles



1) Housing Development Plan

- Targeted balance between HAWC-owned, private developer-owned housing and non-profit developer-owned housing
- Geographic distribution of bond-funded projects
- Balance between new construction and acquisition/rehabilitation of existing housing
- Connection with supportive housing services

2) Strategy for advancing racial equity

- MWESB Contracting
- Affirmative outreach and marketing to target populations
- Low-barrier screening criteria
- Project Based Voucher (PBV) process

5/15/2019

Slide 6



Guiding Principles



3) Community Engagement

- Coordinated outreach to communities of color
- Development community, public and private
- Identification of key issues and priorities for the community

4) Plan for Ongoing Community Engagement

- Phase 2 – contract with community engagement practitioner
- Focused on reaching underrepresented communities, neighborhoods impacted by a proposed housing project, and general community members

5/15/2019

Slide 7



Leveraging Resources

- Maximize use of non-competitive resources
- Maximize use of private resources
- Maximize local resources
 - Project Based Rental assistance
 - Property tax exemption and/or PILOT agreement
 - HAWC Conduit Bonds
 - Housing Production Opportunity Fund and Washington County General Fund
 - Resources of partner jurisdictions



5/15/2019

Slide 8



LIS Development Next Steps

- **4/23** – 30-day Public Comment period begins
- **5/7** – Board of Commissioners Public Hearing
- **5/1–5/31** – Presentations/Listening Sessions with each City Council, Washington County Planning Commission and Policy Advisory Board
- **5/28** – Board of Commissioners Work Session to review LIS Draft 2
- **6/11** – Board of Commissioners Work Session to review LIS Draft 3
- **6/25** – Board of Commissioners considers approval of LIS
- **7/24** – LIS review by Metro Community Oversight Committee
- **8/1** – Metro Council considers approval of LIS

5/15/2019

Slide 9



For more information:

<https://www.co.washington.or.us/Housing/regional-affordable-housing-bond.cfm>

To provide public comment:

AffordableHousingBond@co.washington.or.us

5/15/2019

Slide 10



Introduction:

Department of Housing Services facilitated a conference call with affordable homeownership developers within Washington County to receive feedback on the draft of the County's Local Implementation Strategy. The call included an overview of the Metro Bond, unit production targets, key components of the first draft of the County's Local Implementation Strategy, as well as a timeline for revision and approval of the document. Metro staff also participated in the call to provide context and clarify specific requirements of bond funds when utilized for affordable homeownership.

Key Comments:

- Provide language in the Local Implementation Strategy that keeps the door open to homeownership.
- Consider setting a unit target for homeownership.
- Developers can partner together and use a mixed income model to target lower Median Family Income (MFI) levels.
- Donated land would help lower cost of projects.
- \$100,000 per unit in Metro Bond funds would allow for the development of affordable homeownership units (leveraged with other resources).
- Affordable homeownership developers do have a permanent affordability component, upon every resale. It is also a shared equity model, and they utilize sweat equity.
- Using Metro bond funds to support affordable homeownership development helps achieve Metro's goal of advancing racial equity.

Washington County received five formal letters from individuals representing organizations that operate in the county. Letters were received from the following organizations are included in this appendix.

- Bienestar
- Community And Shelter Assistance Corp. (CASA)
- Community Housing Fund (CHF)
- Community Partners for Affordable Housing (CPAH)
- Welcome Home Coalition



June 11, 2019

Washington County Chair Kathryn Harrington
Board of Commissioners
1551 N. 1st Avenue, MS-21
Hillsboro, OR 97124

Dear Chair Harrington and County Commissioners:

I am writing to you regarding the most recent draft of Washington County's Local Implementation Strategy (LIS) for the Metro Affordable Housing Bond. I wish to commend the staff at Washington County's Division of Housing Services for the hard work they are doing to develop the LIS and move along a process to ensure that the Metro Housing Bond funds benefit the community and serve those most in need of safe, stable and affordable housing.

Bienestar has been a non-profit affordable housing developer operating in Washington County since the early 1980s. We got our start with a farmworker housing development in Forest Grove, to address the appalling conditions that existed in many farmworker housing camps. Over almost four decades of work, Bienestar has helped develop 13 multi-family properties that provide housing for farmworkers, working families and seniors. The organization has a long, rich history of doing the difficult work of affordable housing development in the County, at times even in the face of fierce resistance and even overt racism. Our commitment to provide housing, promote racial equity and build community in the properties we develop runs deep.

Bienestar is also one of only two Community Housing Development Organizations (CHDOs) based in Washington County. Being a CHDO means we have a long-term commitment to this area, and that Bienestar exists not only to serve the community but to also be an important part of that same community. As a CHDO, Bienestar has embraced efforts to increase the funding for affordable housing in our County and worked hard to support the passage of the Metro Housing Bond. Our board of directors took the unusual step of endorsing the passage of the Metro Housing Bond, and several of our staff and residents worked to support the Metro Housing Bond's campaign last fall.

In that context, I would like to offer a few comments on the second draft of the LIS:



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- 1) Bienestar supports consideration in Metro Housing Bond funding decisions for non-profits and in particular non-profits with deep roots in the community and with a demonstrated commitment to racial equity. The second draft of the LIS contains a set aside for CHDOs and small non-profits, though I have heard that that set aside may expand to include all non-profit developers. Although this set-aside is a good first step, I would also ask that the County consider adding points for local non-profits in the scoring of proposals through competitive projection-selection processes. Adding points in scoring systems for local non-profits may achieve the same goal as a set aside but will ensure that there is not a perception of a “ceiling” of funding for local nonprofit developers.
- 2) I am concerned by Appendix B in the draft LIS. The Appendix lists six projects for which the County has apparently already selected sites and developers for projects, including tentative commitments of Metro bond dollars, and lists seven other projects that appear to be for illustration purposes only. The list of six projects don’t seem consistent with the principle of transparency that was central to the Metro bond’s framework and core values. When Bienestar’s board endorsed the Metro bond and our staff and residents advocated for it, we did so in part based on the promise of transparency. To me, the following questions arise: How were these projects selected? What processes were used to evaluate them? Why has there not been a public statement that the County is open to receiving proposals *even before the LIS is finalized and approved by the County Commissioners*? I urge the County staff to be transparent about conversations being held with potential developers who will access Metro bond dollars for their projects, and lay out the process they intend to follow to select projects for Metro bond funding.
- 3) I also want to affirm Bienestar’s view that Washington County should be open to making strategic investments of Metro housing bond dollars to support homeownership, when appropriate. For low- and moderate-income working households, especially households of color, homeownership not only provides housing stability and an opportunity to build assets and create intergenerational wealth, but also frees up scarce units of affordable rental housing for other households. Homeownership models that create permanent affordability but allow homeowners to share in the appreciated value of their home should be considered as an eligible use for Metro Housing Bond funds.
- 4) Finally, I urge the County staff to strongly consider how the LIS and Metro Housing Bond implementation in Washington County will promote racial equity, and to lay down clear markers and measurable outcomes for the promotion of racial equity. Bienestar has been active in the Advancing Racial Equity work being undertaken by Vision Action Network, the Coalition of Communities of Color, and other community-based partners. The work being done by VAN should be considered complementary to the Metro Housing Bond implementation that will roll out over the next several years. The impact



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of the Metro Housing Bond represents a once-in-a-lifetime opportunity to promote racial equity in our community through the creation of housing opportunities for low-income families of color. However, this will only be effective if racial equity is made a priority in the implementation of the bond, as promised in the bond's framework and core values.

Thank you for taking the time to read my comments on the second draft of the LIS. I look forward to participating in upcoming meetings and providing testimony when the final draft of the LIS comes before the County Commissioners. Bienestar looks forward to deepening its commitment to providing affordable housing in Washington County as the Metro Housing Bond is implemented.

Sincerely,

Nathan Teske
Executive Director, Bienestar
503-481-0529
nteske@bienestar-or.org



May 20, 2019

Washington County Chair Kathryn Harrington
Board of Commissioners
155 N. First Avenue, MS-21
Hillsboro, OR 97124

RE: Metro Affordable Housing Bond – Local Implementation Strategy

Dear Chair Harrington and Members of the Commission:

I want to thank the Housing Authority of Washington County (HAWC) and County staff for the time and effort put into the County's Local Implementation Strategy (LIS). Given the short time frame in which the LIS came together, we appreciate that significant effort went in to the public engagement strategy and look forward to seeing the next two iterations before the draft is finalized. We also know that the engagement strategy is ongoing and that the plan specifically spells out additional checkpoints that will allow the plan to "trued up" as needed.

A key stipulation of the bond is to ensure positive outcomes in serving culturally-specific populations. CASA of Oregon has been serving communities of color in the county for more than three decades and is looking forward to working to ensure the equity work undertaken by the county will serve many of these populations.

We want to make sure that the populations that are typically least likely to be served by the county have an opportunity to:

- participate in the county's analysis of need,
- are included in marketing efforts,
- are considered when planning for all aspects of the housing,
- apply for the housing and are not immediately "screened out" by high barriers or culturally inappropriate management companies
- are considered when designing services and
- are eligible to receive culturally appropriate services

HOMEOWNERSHIP

A key to closing the disparity in wealth between whites and people of color (POC) is giving POC the opportunity to gain wealth via homeownership. Since advancing racial equity is a priority for implementation of the bond proceeds, providing home ownership opportunities is one of the best ways to achieve it. Yet homeownership is barely mentioned in the first draft of the LIS When it is

mentioned in the introduction, it is only identified as a “potential” There is additional language that alludes to the “possibility that homeownership units may be supported” but no language that shows the county is serious about closing the racial wealth gap via homeownership.

We think the plan needs to specifically call out homeownership and to put some numbers on it. By ignoring homeownership as a strategy within the plan, the county is missing an opportunity at truly creating equity for communities of color. While the investment per unit for home ownership might be higher than for rental units, the trade-off is worth it. The studies are clear of the benefits of homeownership not only as a wealth-building tool but also in the social outcomes of children and the civic engagement of owners. Homeownership is a tool that the dominant culture has been able to avail itself of and one that COC have been systematically been denied access to.

The HAWC has a self-sufficiency program where it’s clients can access funds to use for homeownership. In addition, a number of organizations in the county provide homeownership via Individual Development Accounts. The plan should identify these additional funding sources and the opportunity they present to be coupled with the bond money for homeownership.

CASA also assists residents in manufactured home communities (MHCs) to purchase their communities and own them as resident-owned cooperatives (ROCs). The ROCs serve a majority of folks earning at or below 60% of AMI. A significant number are also at or below 30%. This makes calling out the preservation of MHCs a particularly appropriate strategy for serving the households being targeted by the bond.

We believe that there are many opportunities within the LIS to call out homeownership as an opportunity to advance racial equity. We encourage the county to be explicit about why some of the bond funds must be committed to the creation and preservation of home ownership.

RESOURCING SERVICE PROVIDERS

A key to successful projects, particularly serving the population envisioned by the bond (ie, those earning less than 30% and POC) means that projects will need to resource culturally-specific and culturally-serving organizations. These are the organizations that will do the outreach, service provision, assist in lease up and other activities that will lead to successful outcomes.

While the plan talks about “...(utilizing) its project-based vouchers in different ways to leverage and support providers who can bring services to the table” and the goes on to also state that the “provision of supportive services is essential”, the plan does not detail what this means. Without clarity on how services are to be provided, they are likely to be the first thing cut from a budget.

Service provision must be a priority and should be clearly spelled out who is providing the services and what those services entail and how those services will be resourced.

There is further discussion in the plan about the “formation of culturally specific partnerships” and the “linking of supportive services” yet no actual promises are made to pay for either of these. Without any promises to actually resource this work, culturally-specific and culturally-serving organizations will likely be asked to do the work for little or no money. This is stark contrast to a discussion about the *Organizing Plan for Implementation* which discusses resourcing the HAWC but says nothing about resourcing the existing local community non-profits and the organizations that are currently providing supports.

Community Engagement: We are pleased that the county is looking at community engagement as an ongoing strategy. We anticipate that this strategy will continue beyond the life of the bond as the need for culturally specific services will continue long into the future.

- The County’s plan to contract engagement services is welcome. We hope that this means using organizations that are already respected in the community and that have the culturally-specific lens necessary to make the engagement meaningful.
- In our experience of developing housing for farmworkers and their families, each stage of the housing development process requires an equity lens:
 - the community engagement strategy to determine where and what to build
 - the process of designing the buildings
 - the engagement of community organizations to provide services
 - the marketing plan for the units
 - the low-barrier screening process
 - the implementation of the screening process and ultimate rent up.

Without being intentional at all of these stages, the default option is that the units will end up being occupied by the dominant population. Please include in the plan that local organizations will be resourced and deliberate and intentional steps will be taken to use an equity lens on each housing project.

Thanks for the opportunity to comment and we look forward to continued discussions on how to deploy this significant new resource in Washington County.

Kind Regards,



Peter Hainley
Executive Director

Community Housing Fund
3700 SW Murray Blvd., #190
Beaverton, OR 97005
503.846.5790



May 6, 2019

Washington County Chair Kathryn Harrington
and Board of Commissioners
155 N. First Avenue, MS-21
Hillsboro, OR 97124

RE: Comments of Draft 1/Metro RAHBP, Washington County LIS

Dear Chair Harrington and Members of the Board:

Thank you for this opportunity to comment on the first draft of the County's Local Implementation Strategy (LIS) for the recent Metro housing bond. We sincerely appreciate the amount of work that multiple departments and jurisdictions have put into this draft strategy over the past six months. We know that you will have a relatively short time to review drafts prior to finalization and submission to Metro in June. We are pleased to see that there will be at least two additional checkpoints for you as bond experience is accumulated and needs reports are updated over the next five years.

There is no doubt that meeting the targets outlined in the LIS will be a heavy lift that will require a variety of existing and new resources. As a long-term Washington County partner in the housing arena, the Community Housing Fund (CHF) looks forward to both the challenges (increased housing production and services alignment) and opportunities (to create minority contracting targets, increase culturally specific outreach and services, revise tenant screening criteria)—which will help us address many of the historic inequities that our housing policies at the local, state and federal levels have created and reinforced.

We have several comments for consideration as you move forward with the LIS:

Community Engagement: We appreciate the new and additional community engagement strategies the County is employing, on a broader basis, and for the LIS in particular:

- The County's new consolidated on-line calendar is a valuable tool and adding the housing bond to the County's home page makes comment opportunities much more visible—which is appropriate given the level of resources being deployed.
- With the LIS Phase I outreach, staff visited a wide variety of groups at their regular meeting times during the day. Most of these meetings took place before a draft LIS was available, so we are pleased that DHS/HAWC has arranged another meeting for housing sponsors next week to provide more detailed feedback.

- Most County boards and commissions meet during the day. For cities within the county, boards and commissions more frequently meet in the evening, with “technical advisory committees” of stakeholder held during the day. This may impact the breadth of involvement. Some cities have reported that 40% of recent applicants to boards and commissions have self-reported as members of communities of color. With commitment to programs such as Civic Leaders, it appears the County’s diversity on boards and commissions will similarly grow. At least one well-advertised evening or weekend open house or public hearing related to the LIS would go a long way towards demonstrating the County’s intentionality in gathering the broadest feedback.

Project Selection Criteria: Given the variety of priorities under consideration, the 8-10 projects anticipated with this funding may not fall into any particular areas related to need, geography, or target population. This is not a new dilemma—housing policies at local, state and federal levels have historically struggled with preferences to target resources to particular communities (i.e. areas with minority or poverty concentrations) vs. the desire to building housing in areas of high opportunity. Hence, the question asked repeatedly during Phase I outreach: If housing prices were not a barrier, which community would you choose to live in?

- Given higher need estimates in certain communities (i.e. Tigard and Forest Grove), it might be appropriate to provide geographic preference points that would prioritize some resources. Since we know a beta project is currently under review in Tigard, this may happen organically, but is an important consideration.

Threshold Requirements:

- 10% MWESB is a lower target than many other jurisdictions will establish for Metro bond funds. While this is a new arena for contractors working in Washington County, setting a stretch goal may be what is needed to achieve real change. We know that the current beta project would be built by a sponsor who has set a voluntary target of 20%, by a contractor who has often exceeded that on other projects. We would prefer to see this set at 20%.
- Affirmative outreach and marketing, as well as revision of screening criteria will require extensive work with sponsors and management agents. Some of the administrative resources associated with the bond will likely need to be targeted to this work.

Competitive Selection Criteria:

- Nonprofit Preference: We appreciate the preference for nonprofit sponsors, particularly for special needs projects, but want to ensure that consideration is given to both the housing and services budgets to make sure these projects are “whole” and can function successfully for the long run. It would be unfair and unwise to assume nonprofits can/will work to fill gaps not filled by the bond or County.
- Permanent Supportive Housing: Reflecting on the Tri-County Report, we know how important the coordination of resources is for successful PSH. We would like to see a definitive link between the bond resources and the development of these units. Services required for this population go beyond those provided “in general” for units targeted to those at 30% of area median income and below.
- Culturally Specific Services: We lack a strong infrastructure in Washington County, especially in the property management arena for marketing to diverse populations. With the County’s

leadership in this arena, this will need to focus on grassroots distribution of information, not depending on the usual print and electronic.

- Universal Design: How will we increase the number of accessible and visitable units through the development of bond projects? Will this be based on education and outreach, preference points?

Maximizing Non-Competitive Resources:

This is a good approach, but with 8-10 projects we know there will be a variety of financing plans, some including competitive resources (9% LIHTC, HOME), and others structured solely with local incentives and Metro and 4% bonds. Maintaining a pipeline of “other” projects may be challenging, given that we know there will be gaps to fill even in these “non-competitive” models. The County’s Housing Production Opportunity Fund is a more critical resource than ever, and we appreciate your creation of this critical resource a few years ago. We support an increased allocation in this year’s County budget.

In short, we look forward to continued discussion on this exciting new resource in Washington County, and how it can most effectively be deployed. We know that staff are working hard with limited resources and a short time frame.

We look forward to partnering with you, and the Cities of Beaverton and Hillsboro, to develop thousands of new homes in the coming decade, many of which would not have been possible without the Metro housing bond. We know there are many stretch goals and new initiatives to refine to ensure that the funds address longstanding racial disparities in our housing markets. As Washington County’s Vision notes: “...the fulfillment of our community vision will require governments, business, nonprofits, religious and civic organizations to align passion and resources to serve our community...” The Metro bond provides an excellent opportunity for us to work towards that end.

Sincerely,

Sheila Greenlaw-Fink
Executive Director



June 7, 2019

Washington County Chair Kathryn Harrington
Board of Commissioners
155 N. First Avenue, MS-21
Hillsboro, OR 97124

RE: Metro Affordable Housing Bond- Local Implementation Strategy

Dear Chair Harrington and Members of the Commission:

Thank you so much for the work you are doing to support the development of affordable housing in Washington County. At Community Partners for Affordable Housing (CPAH), we are looking forward to the implementation of the bond, along with other housing resources, to address some of the great need in the community.

CPAH has been part of the Washington County community since 1993 and is dedicated to safe, healthy and sustainable housing for families, seniors and people with disabilities. We are deeply committed to a world of housing justice, where everyone has a safe and healthy home to live in. CPAH has been building and rehabilitating rental housing, managing that housing, and providing service to our residents. We are currently about to break ground (this year) on two projects - one in the Tigard Triangle and the other in Beaverton.

We thank the board and staff for the attention paid to supporting local non-profits in this work. We have been here a long time and our intention is to stay. As a Community Housing Development Organization (CHDO), we take our commitment to Washington as an important part of our organizational goals. We work hard to stay connected to local planning efforts and projects, participating in numerous committee meetings and planning opportunities. We have partnerships with local agencies and service organizations and dedicate time and effort to maintaining those relationships for the benefit to our current residents and future residents.

Along with our appreciation to staff and elected officials for the work that has gone into the Local Implementation Strategy, we have some additional comments and concerns that we would like to share.

- 1- We are pleased that there is some commitment to working with housing non-profits. In the Local Implementation Strategy (LIS), you call out a set-aside for CHDO's and I understand that may broaden to housing non-profits in general. As a CHDO, we do have a special role to serve this community and to represent low-income people who live here. However, regardless of this, our hope is that any set-aside is a floor, not a ceiling. It is our belief that housing non-profits bring with them rich benefits that include strong partnerships, a commitment to low-barrier housing, and ongoing support for our

CPAH does not discriminate against any person on the basis of age, race, color, religion, sex, sexual orientation or gender identity, disability [physical, mental or developmental], familial or marital status, or national origin, in admission or access to, or treatment of, residents, employees or volunteers in any of its projects or programs.



community partners in housing efforts. We think that these qualities should assist our organizations in scoring during a selection process. We believe that there are ways to prioritize non-profits that recognize the added important benefits we bring to the projects.

- 2 - We are very concerned about the long list of projects included in the LIS as an attachment. From this list, it appears that decisions or early commitments have been made to a number of projects. However, based on previous information, we were under the impression that there would be some notice of funding available to the community that would include opportunities to apply. We were also under the impression that there would be a clear and transparent process for most of the funds involved and that funds would be available starting in the late fall or early winter, not all at once.

While we are totally on board with the need for a "Phase One Project", the appearance of early commitments is offkey. The overall goals of the Metro bond, including leading with racial equity, are best achieved through open and clear processes. Additionally, we think early commitments do not support the thoughtful portfolio planning approach that the LIS intends, as indicated in the strategy.

- 3 - We urge the county to be more specific as you think through how to operationalize equity and supportive housing. How will you measure success? These goals will not be achieved simply through intentions. And while priorities are hard to set regarding project selection criteria, without being more specific those priorities will shift to be the easiest projects to complete.

Again, thank you for your efforts, successes with community engagement, and dedication to this issue. The county staff we work with are passionate and believe strongly in the benefits of affordable housing.

We look forward to continuing our long partnership with Washington County.



Rachael Duke
Executive Director



June 11, 2019

Washington County Chair Kathryn Harrington
Board of Commissioners
155 N. First Avenue
Hillsboro, OR 97124

RE: Second Draft of Washington County's Metro Housing Bond Local Implementation Strategy

Chair Harrington and Members of the Commission:

Thank you for your work and for the work of the County staff in drafting the County's Local Implementation Strategy (LIS) for Metro's affordable housing bond. As a coalition of dozens of organizations — many from Washington County — committed to finding dedicated revenue sources that increase the supply of and access to affordable housing, the Welcome Home Coalition is excited to see this work unfold.

In your consideration of potential changes made to the third version of the draft LIS, we would encourage the items below.

1. Expand housing for our most vulnerable neighbors

The current version of the LIS has Washington County aiming to develop 334 units for households at 30 percent area median income (AMI) and below, the threshold identified in Metro's bond framework. This threshold ought to be a floor, and we would encourage the County to look for ways to increase the development of units for our most vulnerable neighbors beyond this threshold.

Similarly, the current LIS has Washington County developing 407 units with two or more bedrooms. Again, this is the threshold that we would consider a floor outlined in the Metro bond framework. We would urge the County to seek ways to increase this number, as it will be critical for improving housing security for vulnerable families.

We are glad to see language that projects with higher percentages of units at or below 30 percent AMI or with 2+ bedrooms being given a larger share of available funding. That is a worthy component that we would hope to see in the finalized LIS.

2. Lead with racial equity

Generally speaking, the second draft of the LIS makes improvements on the first version, particularly in the use of more affirming language in the County's commitment to racial equity. As the County aptly notes, Washington County is our state's most racially diverse county. As such, it is particularly critical that Washington County's racial equity plan be one that is actionable and

measurable. There are several ways in which the second version of the LIS could be strengthened to this point.

First, we would urge the County to strengthen its minority, women, and emerging small business (MWESB) goals. We are encouraged to see the County increase its aspirational goal to 20 percent of contracting done with MWESB businesses, but that goal ought to be a standard, not simply aspiration. We should maximize the available bond dollars to their fullest extent by addressing the housing crisis while investing in historically marginalized communities.

Second, the most recent draft of the LIS appears to add additional screening requirements for tenants, particularly by increasing barriers for individuals who have been convicted of a criminal offense. Because of the historical and current systemic racism in our criminal justice system, a disproportionate number of people of color have had involvement with the justice system and thus are disproportionately screened out of housing. We appreciate the effort to reduce barriers to tenant access but feel that the first draft of the LIS tenant screening criteria better advances racial equity, with its emphasis on only considering convictions that may impact tenant success and excluding arrests from consideration. As currently written, the LIS is unclear whether documentation of a disability and evidence of rehabilitation must be shown for all convictions, or only recent ones. We recommend that this language be clarified so that project sponsors must consider the nature of the underlying conduct for any conviction, and limiting the "look-back" period for criminal convictions. By tying consideration of convictions to those which most greatly impact tenant success, the County can better achieve its goal of racial equity.

Lastly, we would urge the County to continue finding ways to conduct outreach to communities of color and culturally-specific organizations. To date, it appears that outreach has been split between service providers and people affected by housing insecurity. We would urge the County to continue outreach to people affected by housing insecurity, particularly those in communities of color, and ensure that outreach is done using materials in people's first languages.

3. CHDO set aside

We were encouraged to see a \$25 million set aside for Community Housing Development Organizations (CHDO's) in the most recent draft of the LIS. As you likely know, CHDO's receive their designation in part by having at least one-third of their board made up of representatives of the low-income community. Moreover, CHDO's must create formal processes for input from the communities they serve regarding the design of projects, where they are sited, how properties are managed, and other critical factors. We would hope to see this set aside remain in the final LIS as part of the County's broader equity strategy, as it would ensure a level of community input and control over those projects.

4. Project financing

The current draft of the LIS indicates the County has added 9 percent Low Income Housing Tax Credits (LIHTC) as a possible funding source. As you know, 9 percent credits are competitive, and the application process is time consuming. The modeling for the bond was done with the assumption of using only 4 percent LIHTCs and we would encourage the County to not rely too heavily on financing that ultimately might not be available, would take much longer to implement and is a primary source of funding for non-bond funded projects.

5. Ongoing transparency

We are concerned about the contents of Appendix B. It is not clear whether this is indeed the case, but the level of specificity in the table suggests that a process for developing certain projects may already be underway. If that is the case, we would urge the County to pause and allow for the LIS to be finalized, particularly in light of the racial equity goals spelled out in the draft LIS. It is important that those goals be clear and quantifiable prior to any decisions regarding specific projects being made, and it will be crucial that communities feel like they have input into project implementation.

Again, we want to thank you and the County staff for your dedication to this important work. We know this implementation is a major undertaking, and we appreciate your consideration for the items raised above. We look forward to working with you to ensure the successful implementation of these bond dollars.

Sincerely,

A handwritten signature in blue ink that reads "Tyler Mac Innis". The signature is written in a cursive, flowing style.

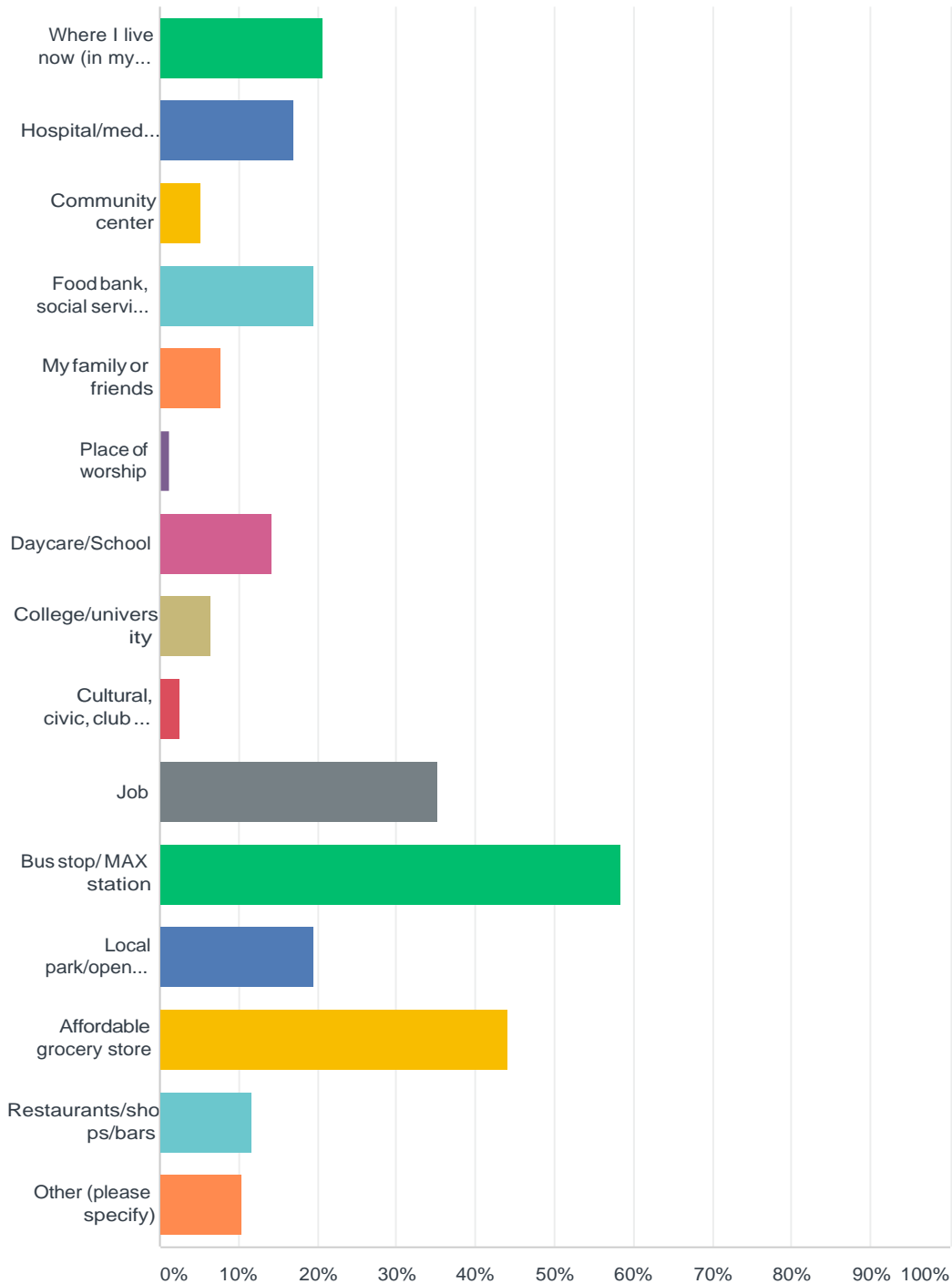
Tyler Mac Innis, Coalition Director

In Spring 2019, Metro conducted a regionwide online survey on housing. 77 individuals from Washington County responded to the survey. Metro has provided the following summary of the survey results for Washington County.

In addition Metro staff also coordinated with the Asian Pacific American Network of Oregon (APANO) to conduct one-on-one interviews with individuals from that community between April 17-April 24. A summary of those interviews is provided following the survey results.

Q1 Why did you pick that location? It is close to (mark your top 3)

Answered: 77 Skipped: 0



ANSWER CHOICES	RESPONSES	
Where I live now (in my community)	20.78%	16
Hospital/medical office	16.88%	13
Community center	5.19%	4

Housing Bond Survey

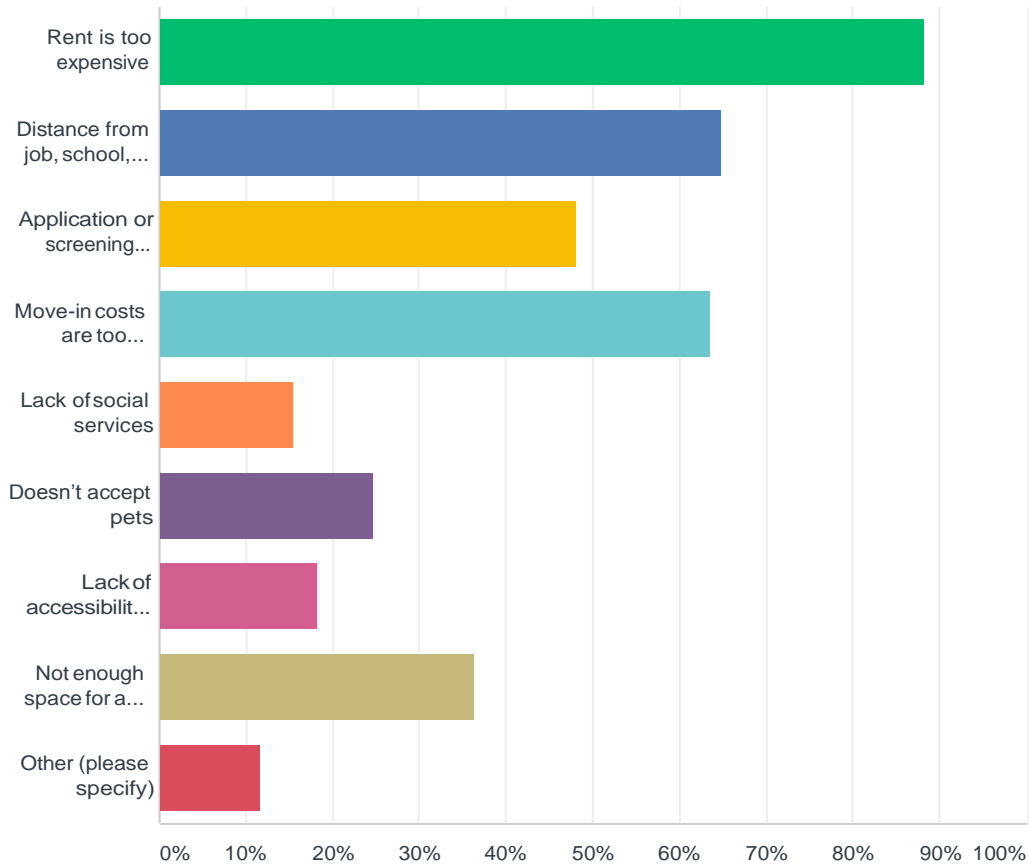
Food bank, social service agency, other service	19.48%	15
My family or friends	7.79%	6
Place of worship	1.30%	1
Daycare/School	14.29%	11
College/university	6.49%	5
Cultural, civic, club or organization	2.60%	2
Job	35.06%	27
Bus stop/ MAX station	58.44%	45
Local park/open space/ trail	19.48%	15
Affordable grocery store	44.16%	34
Restaurants/shops/bars	11.69%	9
Other (please specify)	10.39%	8
Total Respondents: 77		

Q2 What other things about the area you picked (beyond what's close by) make it a good location for new affordable housing?

Answered: 68 Skipped: 9

Q3 What do you think are the biggest challenges people face when trying to find a place to live?

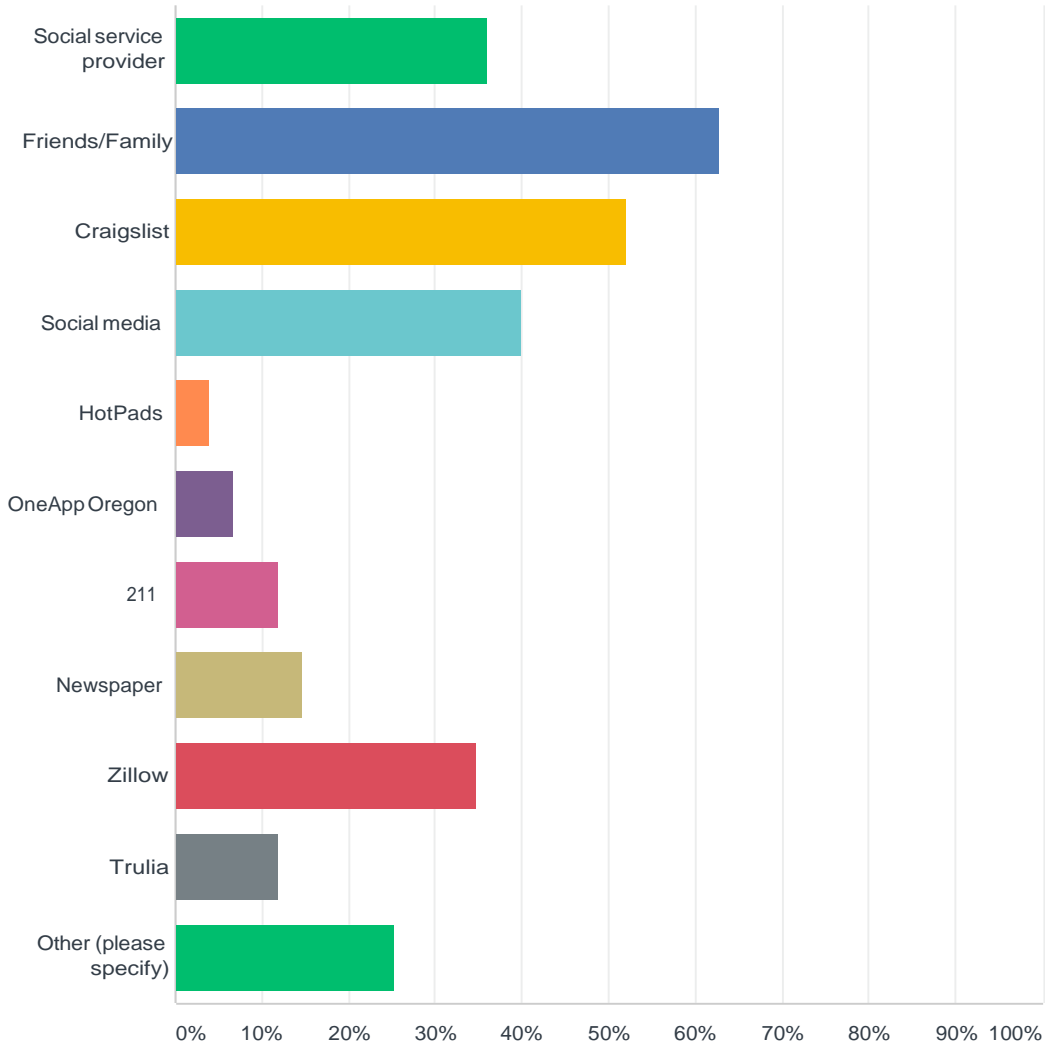
Answered: 77 Skipped: 0



ANSWER CHOICES	RESPONSES	
Rent is too expensive	88.31%	68
Distance from job, school, friends, family, school, etc.	64.94%	50
Application or screening criteria too strict (income requirements, criminal and credit reports, rental history, etc.)	48.05%	37
Move-in costs are too expensive	63.64%	49
Lack of social services	15.58%	12
Doesn't accept pets	24.68%	19
Lack of accessibility for people with disabilities	18.18%	14
Not enough space for a family	36.36%	28
Other (please specify)	11.69%	9
Total Respondents: 77		

Q4 How do people find available housing?

Answered: 75 Skipped: 2



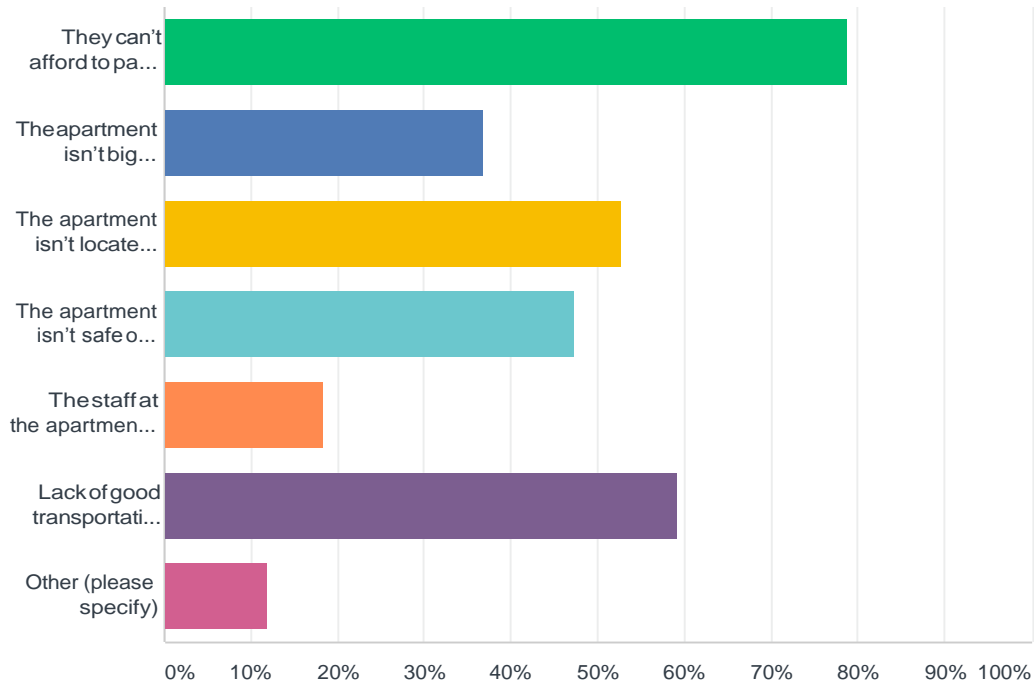
ANSWER CHOICES	RESPONSES	
Social service provider	36.00%	27
Friends/Family	62.67%	47
Craigslist	52.00%	39
Social media	40.00%	30
HotPads	4.00%	3
OneApp Oregon	6.67%	5
211	12.00%	9
Newspaper	14.67%	11
Zillow	34.67%	26
Trulia	12.00%	9

Housing Bond Survey

Other (please specify)	25.33%	19
Total Respondents: 75		

Q5 What do you think are the biggest challenges that make it difficult for people to stay in affordable housing?

Answered: 76 Skipped: 1



ANSWER CHOICES	RESPONSES	
They can't afford to pay the rent	78.95%	60
The apartment isn't big enough for a family	36.84%	28
The apartment isn't located where they want to live	52.63%	40
The apartment isn't safe or habitable	47.37%	36
The staff at the apartment aren't able to provide enough support to the person/family	18.42%	14
Lack of good transportation options	59.21%	45
Other (please specify)	11.84%	9
Total Respondents: 76		

Q6 What types of services, programs, and/or support are needed to overcome these challenges?

Answered: 64 Skipped: 13

Q7 What other advice do you have for housing providers to make sure the people who most need affordable homes can be successful?

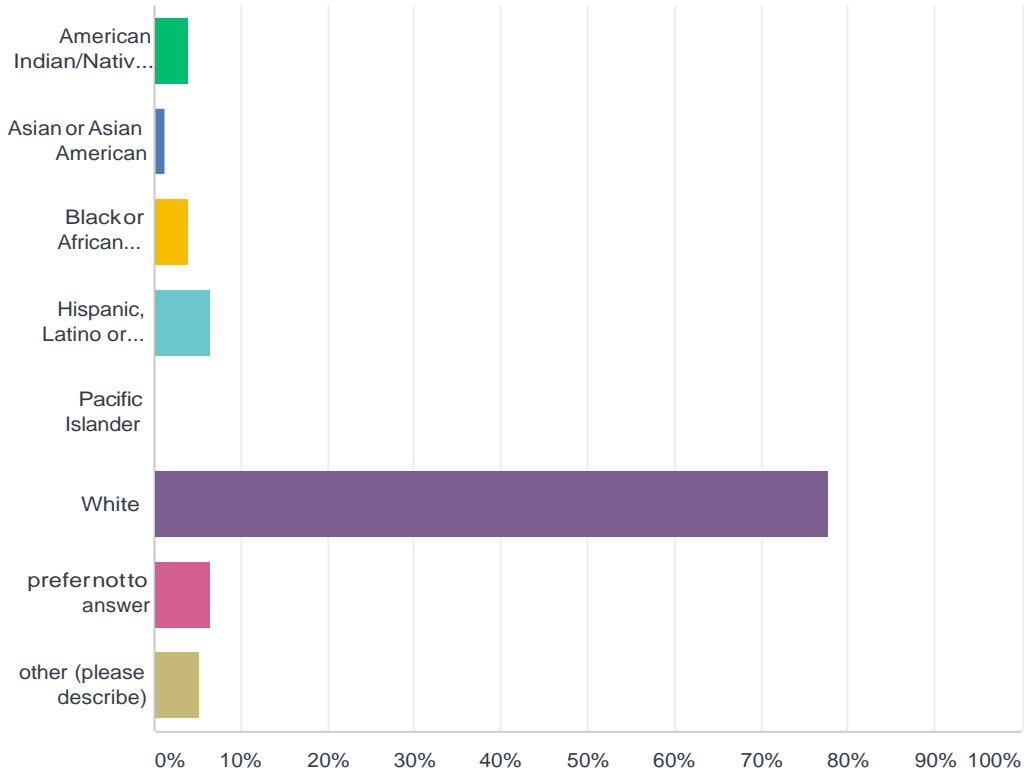
Answered: 59 Skipped: 18

Q8 What is your current zip code?

Answered: 77 Skipped: 0

Q9 When asked about your racial or ethnic identity, how do you identify?

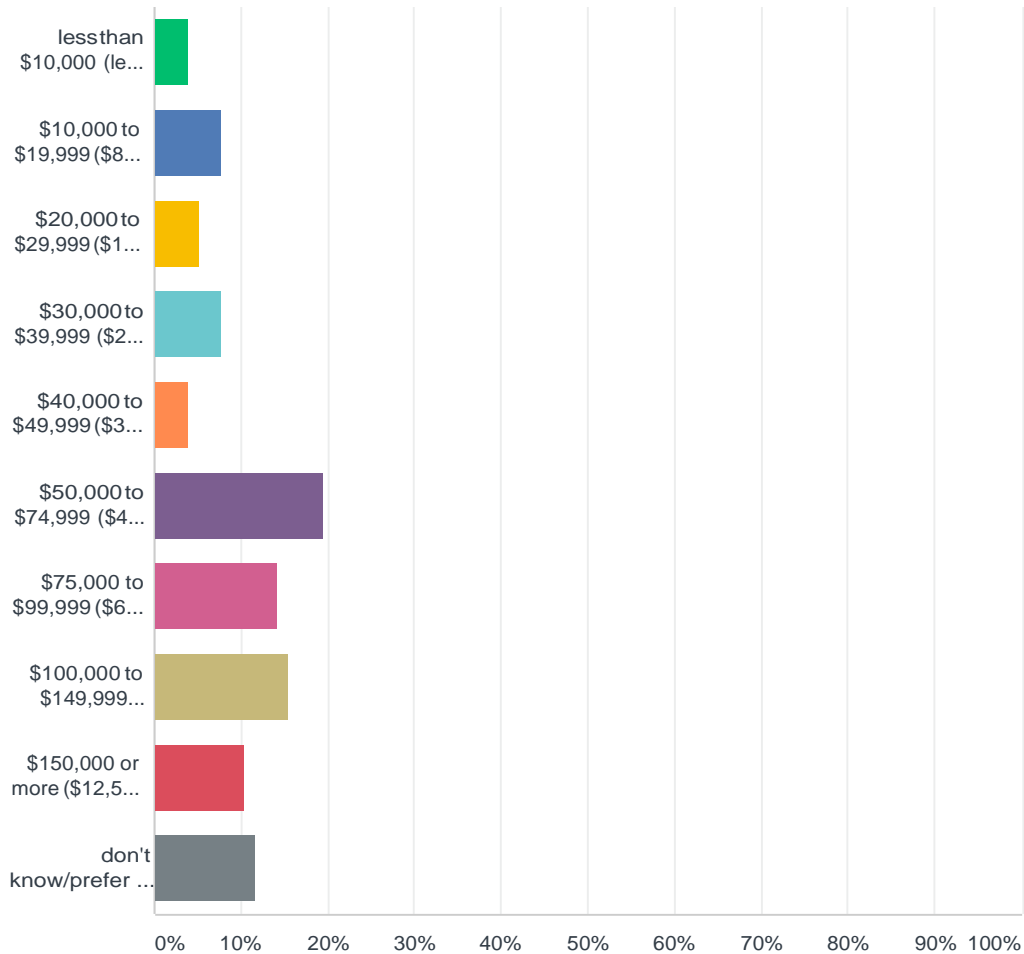
Answered: 77 Skipped: 0



ANSWER CHOICES	RESPONSES	
American Indian/Native American or Alaska Native	3.90%	3
Asian or Asian American	1.30%	1
Black or African American	3.90%	3
Hispanic, Latino or Spanish origin	6.49%	5
Pacific Islander	0.00%	0
White	77.92%	60
prefer not to answer	6.49%	5
other (please describe)	5.19%	4
Total Respondents: 77		

Q10 Which of the following best represents the annual income of your household before taxes?

Answered: 77 Skipped: 0

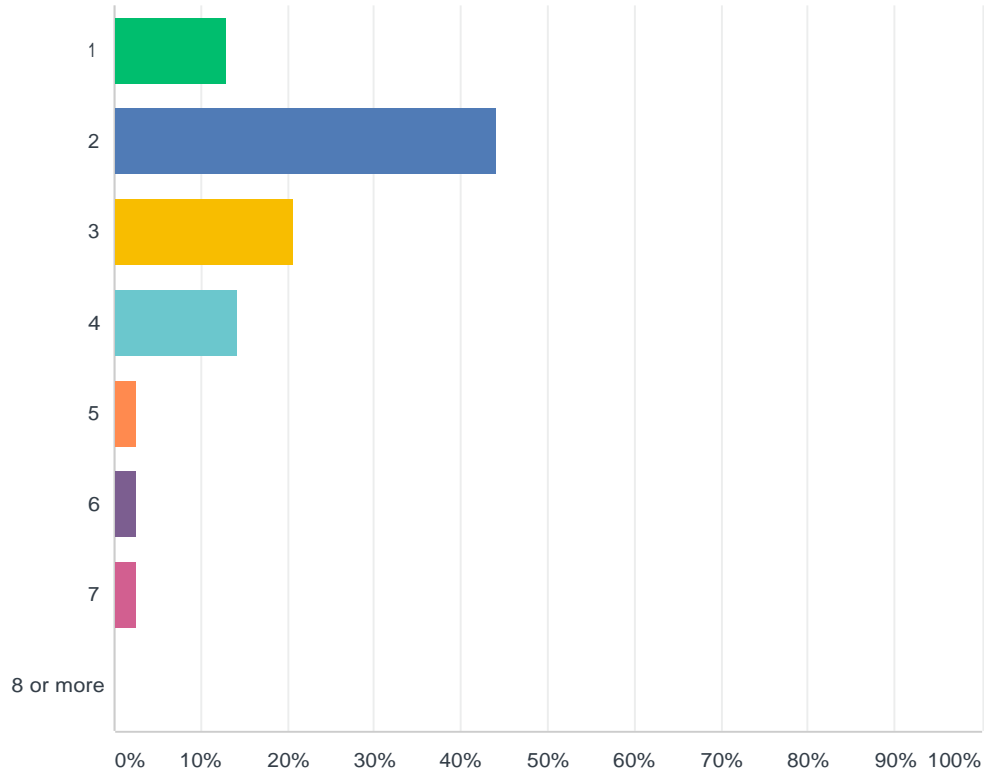


ANSWER CHOICES	RESPONSES	
less than \$10,000 (less than \$833 per month)	3.90%	3
\$10,000 to \$19,999 (\$834 to \$1666 per month)	7.79%	6
\$20,000 to \$29,999 (\$1667 to \$2499 per month)	5.19%	4
\$30,000 to \$39,999 (\$2500 to \$3333 per month)	7.79%	6
\$40,000 to \$49,999 (\$3334 to \$4166 per month)	3.90%	3
\$50,000 to \$74,999 (\$4167 to \$6249 per month)	19.48%	15
\$75,000 to \$99,999 (\$6250 to \$8333 per month)	14.29%	11
\$100,000 to \$149,999 (\$8334 to \$12499 per month)	15.58%	12
\$150,000 or more (\$12,500 or more per month)	10.39%	8
don't know/prefer not to answer	11.69%	9

TOTAL	77
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Q11 How many people live in your house (including yourself)

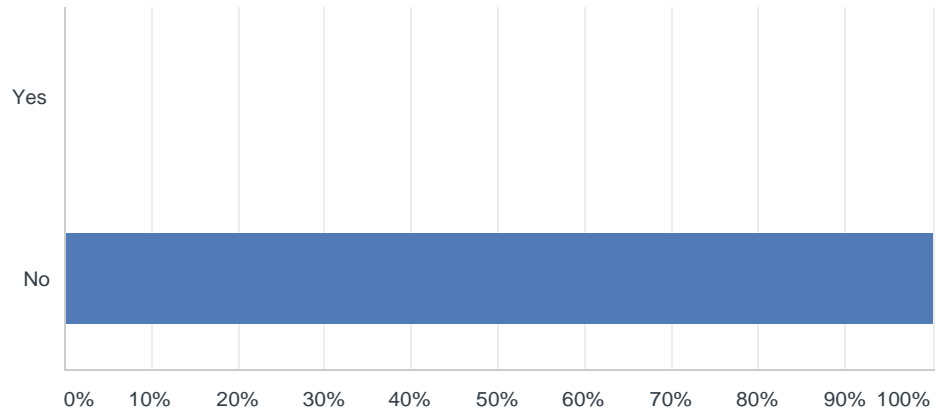
Answered: 77 Skipped: 0



ANSWER CHOICES	RESPONSES	
1	12.99%	10
2	44.16%	34
3	20.78%	16
4	14.29%	11
5	2.60%	2
6	2.60%	2
7	2.60%	2
8 or more	0.00%	0
TOTAL		77

Q12 Do you currently live in income-restricted affordable housing?

Answered: 77 Skipped: 0



ANSWER CHOICES		RESPONSES	
Yes		0.00%	0
No		100.00%	77
TOTAL			77

Q13 To be entered in a raffle for two tickets to the Oregon Zoo, share your email address.

Answered: 50 Skipped: 27

ANSWER CHOICES	RESPONSES	
Name	0.00%	0
Company	0.00%	0
Address	0.00%	0
Address 2	0.00%	0
City/Town	0.00%	0
State/Province	0.00%	0
ZIP/Postal Code	0.00%	0
Country	0.00%	0
Email Address	100.00%	50
Phone Number	0.00%	0



What: Summary of 7 one-on-one interviews based on questions from Metro regarding housing, transportation, and parks

Who: Interviews conducted by Jairaj Singh - Community Outreach Manager at APANO - with South Asian identified adults in Washington County, Oregon

When: Interviews conducted between April 17th - April 24th, 2019

Questions/Topics and Responses:

What makes a place great?

- Walking distance to work and access to public transit
- Ease of access to workplace, grocery store, recreation activities, close to friends, and airport
- Any place that meets children's needs, an area that also suits families, young professionals, and couples with no kids
- Quality schools, opportunities for after school activities, recreational centers, mixed use and also single family homes, places to volunteer, stores for all income levels, diverse housing
- Access to quality parks, libraries, places to gather and celebrate events - festivals and markets - developments such as Orenco station - T.O.D. sites
- Lack of traffic congestion and close to nature

Housing

How do people in your community find affordable housing?

- "Generally hard to find", internet, real estate agents, city resources, or drive around different places

What are the biggest challenges people face when trying to find a place to live?

- Minimum income requirements, past circumstances, high cost of housing/rent, property taxes are too high, and discrimination for loan approvals

What are the biggest challenges people face when trying to find a place to live?

- Not having a steady employment and paycheck, lack of financial resources and support - ex. those in retirement
- Past or changing circumstances - health issues, loss of job, rise in cost of housing, as well as property taxes and utilities, more wealthier people moving in and displacing lower-income residents



What services, programs, and/or support are needed to overcome these challenges?

- Housing resource centers that are quick, efficient, and practical for community members and immigrants seeking stable housing - making mortgages possible
- More governmental/professional advocates, policy changes - especially around zoning laws and regulations in order to allow for the development of community centers and affordable housing in communities of color
- Rent assistance programs, stop-gap measures on property taxes for long-time owners
- Language translation and interpretation, support with technology, financial literacy - especially around refinancing

Parks

- Funding for the long-term ranked the highest on average for the one-on-one interviews conducted, specifically making playgrounds with environmentally friendly materials and use displays to teach visitors about nature and how to protect it for future generations
 - This criteria was followed by: Reduce Pollution, Disability Accessibility, Metro Destinations, Contracting

Transportation

- **What makes trips difficult or uncomfortable?**
 - Traffic congestion at peak hours and length of commute
 - Low frequency of buses and overcrowding, lack of connectivity and affordability in regards to public transit
 - Lack of separated sidewalks
 - Concern for houseless population on trails
- Cleaner buses: replacing diesel buses with clean and quiet electric buses ranked on average the highest from the one-on-one interviews - the main concern is that it is expensive and should not be funded on the backs of low income residents
- Safety improvements: wider and separated sidewalks, more bus shelters to protect from cold and rain
- Technology: wifi at transit stops was not a priority, but expanding the use of traffic lights that work together to keep traffic moving, and more time for elderly to cross through crosswalks
- During several interview discussions there was a general need and demand for a more extensive, affordable, comfortable and efficient public transit system

Appendix D – Glossary

Accessory Dwelling Unit (ADU)

An ADU is a second living unit, limited in size, allowed with a single family home. ADUs may be built within a primary residence (as in an attic or basement), attached to the primary residence (an addition), or detached from the primary residence (such as conversion of a detached garage or construction of a new free-standing unit).

Affordable housing

Housing is considered affordable when housing costs total no more than 30 percent of the household's gross income. Housing costs include: rent or mortgage payments (including insurance and taxes), and basic utility costs (electricity, water, garbage, etc.).

Appropriately zoned

Property that is zoned for the intended use versus requesting a zoning change which can be time consuming and costly.

CHAS data

CHAS stands for Comprehensive Housing Affordability Strategy. These data are comprised of custom tabulations of American Community Survey (ACS) data from the US Census Bureau and are received annually by the US Department of Housing and Urban Development (HUD). These data demonstrate the extent of housing problems and housing needs, particularly for low-income households.

Chronically homeless

Chronically homeless means: (1) A “homeless individual with a disability,” who: (i) Lives in a place not meant for human habitation, a safe haven, or in an emergency shelter; and (ii) Has been homeless continuously for at least 12 months or on at least 4 separate occasions in the last 3 years the combined occasions equal at least 12 months; (2) An individual who has been residing in an institutional care facility, including a jail, substance abuse or mental health treatment facility, hospital, or other similar facility, for fewer than 90 days and met all of the criteria in paragraph (1) of this definition, before entering that facility; or (3) A family with an adult head of household (or if there is no adult in the family, a minor head of household) who meets all of the criteria in paragraph (1) or (2) of this definition, including a family whose composition has fluctuated while the head of household has been homeless. (24 CFR 578.3)

Community engagement

Community engagement is a way of developing a working relationship between public bodies (such as local governments) and community groups.

Consolidated Plan

The Consolidated Plan is a five-year housing and community development strategic plan that is based on quantitative and qualitative data collection combined with community engagement (involving county departments, city partners, state agencies, non-profit partners and community members) to inform how to best utilize the scarce federal resources over the five year period. The U.S. Department of Housing and Urban Development (HUD) requires that jurisdictions receiving Community Development Block Grant (CDBG), HOME Investment Partnerships and Emergency Solutions Grant program funds produce the Consolidated Plan in order to receive their federal funding allocation.

Culturally specific

The term is used usually in connection with a “thing” such as “outreach” or “services” and means that the outreach or services are designed for and conducted by the cultural group being targeted.

Density bonus

A density bonus allows a greater number/percentage of dwelling units on a site than code standards would normally allow. When a jurisdiction allows a density bonus it is commonly in exchange for a developer’s commitment to provide a share of affordable housing units and/or certain other amenities intended to benefit the public. If affordable housing is the goal, some jurisdictions may pair the density bonus allowance with other incentives such as reduced development fees.

Fair Housing Act

The Fair Housing Act, or Title VIII of the Civil Rights Act of 1968, originally prohibited housing discrimination based solely on race, color, religion or national origin. In 1988, Congress expanded the law to include people with disabilities as a protected category within the terms of the Fair Housing Act.

Fair market value

The price a property would sell for on the open market, which is based on an appraisal comparing the values of other similar, nearby, recently sold properties.

Gentrification

Most often defined as redevelopment of deteriorating neighborhoods that results in displacement of current residents (who often represent lower income and/or minority populations) by more affluent residents. Some research suggests that gentrification does not always result in displacement and other factors can be at play, such as existing resident incomes rising, higher income housing is built in deteriorating neighborhoods, or low income residents moving out due to regular reasons such as marriage/divorce, job change, children, etc. (A Picture of Gentrification, December 2017, Reid Ewing, Planning Magazine) although there are many who disagree with this research.

HUD

The U.S. Department of Housing and Urban Development, which oversees the Community Development Block Grants (CDBG), HOME, Public Housing and Housing Choice Voucher programs, to name a few.

Low-income household

As widely defined by governmental and nonprofit organizations, a household with an income at or below 80 percent of area median income. The numbers are determined by HUD and adjusted for family size. See “Median Family Income.”

Low Income Housing Tax Credit (LIHTC)

A tax incentive created in the Tax Reform Act of 1986 that is designed to attract equity capital for investment in rent restricted affordable housing. The program encourages the production of affordable housing by offering owners tax credits for a ten year period based on the cost of development and the number of low income units produced.

Market rate housing

Rental or for-purchase housing that is not regulated by a government agency and the market determines the price.

Median Family Income (MFI)

A term used by most federal programs to describe published income standards for various areas of the country that are used as benchmarks for determining households' eligibility for federally funded programs. "Median" means that half of all households in the area are estimated to have more than this amount of income and half have less; a household is everyone living within the home and they do not have to be related. Washington County is in the Portland-Vancouver-Hillsboro OR-WA Metropolitan Statistical Area which consists of Clackamas, Columbia, Multnomah, Washington, and Yamhill Counties in Oregon, and Clark and Skamania Counties in Washington.

Permanent Supportive Housing (PSH)

Low-barrier, deeply affordable housing with supportive services to help people live with stability, autonomy and dignity. Supportive housing is for highly vulnerable people who have complex health needs, including those with untreated or undertreated mental illness and addictions and have long-term homelessness in their background. Qualification to live in the housing does not expire after a certain amount of time therefore the housing is permanent.

Project Based Voucher (PBV)

Project Based Vouchers (PBVs) are part of the Housing Choice Voucher Program, which is the federal government's major program providing rental assistance to eligible families, the elderly, and the disabled that allows them to rent units in the private rental market. Housing choice vouchers are administered locally by public housing agencies. The subsidy is paid directly to the landlord and the difference is paid by the tenant. Project based vouchers are issued to a specific property and the project based units are rented to income qualified families. The voucher stays with the property whose construction and/or operations are usually funded through local, state and federal programs and already has rent restrictions. The project based vouchers allow these properties to serve people and families at extremely low incomes (<30 percent MFI).

Project cost efficiency

Instituting best practices in order to build affordable housing at a lower cost without sacrificing quality.

Racial equity

Inequity that results from structural racism (policies, practices and cultural norms). When skin color no longer determines socioeconomic outcomes, racial equity will be achieved.

Equitable Housing

Diverse, quality, physically accessible, affordable housing choices with access to opportunities, services and amenities.

Equity

Addressing people where they are at and providing what is needed to be successful. Often described along with equality, which gives everyone the same assistance whereas equity acknowledges people are starting from different places and people need differing levels of help to in order to succeed.

Regulated affordable housing

Income-restricted or regulated housing, generally funded by state, local or federal government, that is available only to residents who earn less than the area median income (AMI), usually 60 percent AMI, but sometimes up to 80 percent AMI.

Rental assistance

Participants pay a portion of their adjusted gross income (i.e. income after standard deductions) for rent and the remainder of the rent is paid by a voucher that is funded by local, state, federal, or sometimes private, funding sources. Examples are Section 8, Housing Choice Vouchers, and short term rental assistance that prevents eviction and homelessness.

Resident services

Services available to residents of “regulated affordable housing” that are often required by government funders when they supply construction and/or operating funds for a project. Services provided can include classes such as how to balance a budget or be a good renter, how to cook healthy meals, after school homework clubs and mobile medical exams.

Section 8

One of the Housing Choice Voucher Program Voucher programs in which participants pay a portion of their adjusted gross income (i.e. income after standard deductions) for rent and the remainder of the rent is paid by HUD. Section 8 is either project based or tenant based. See “Housing Choice Voucher Program.”

System Development Charges (SDCs)

A system development charge is a one-time fee imposed on new development to equitably recover the cost of expanding infrastructure capacity to serve new customers. SDCs are not taxes—they are collected for a specific purpose and provide a distinct benefit to the persons who pay the fee. SDC revenue is restricted by statute, and SDC revenue must be used to provide needed capital improvements. SDCs are generally paid at the same time as development permits.

Target population

The people for whom housing is intended whether the criteria is income based, such as <60% MFI, or a population based such as farmworkers or those with Severe and Persistent Mental Illness (SPMI).

Trauma informed outreach

Trauma informed engagement opportunities and environments allow for the acknowledgment of the existence of community-level trauma which stems from historic and structural conditions of racism, disenfranchisement, and isolation and encourages transparency about what partners representing traditional positions of power (such as government agencies) are offering or asking. Examples of trauma informed engagement opportunities might include: acknowledgment of harm done in the past; ensuring consistency with process; peer to peer approaches and/or facilitation by peers; and, barrier free participation such as location (government building vs. library or community center), childcare, accessibility, and compensation.

Administrative Share Funding and LIP Anticipated Timeline

Total Administrative Share available as of the Effective Date: \$2,303,216

(Total Administrative Share: \$2,451,906 less 2018-19 Administrative Share disbursed: \$148,690)

The parties expect to review the following schedule on an annual basis; provided, however, the schedule set forth below may only be revised or amended upon written agreement by both LIP and Metro.

Fiscal year	Annual Administrative Share Allocation	Percent of total Admin Share	LIP Anticipated Timeline/ Program Milestones
Year 1: 2019-20	\$460,000	20%	Phase I Project: Construction loan closing, groundbreaking and construction start (\$11 million of bond allocation)
			NOFA 1: Release of NOFA for up to \$80 million of the bond allocation which includes the \$25 million set-aside for non-profits. Anticipated selection of 6-8 projects for funding.
			Site Acquisition: Allocate \$6 million of the bond allocation to acquire site(s) for future RFPs in Washington County in collaboration with Metro and local jurisdictions. Additionally, it is anticipated that \$12.9 million or more in Metro regional acquisition funds will be used for site acquisition in Washington County in Years 1–5.
Year 2: 2020-21	\$460,000	20%	Phase I Project: Construction completion and Certificate of Occupancy (June 2021)
			NOFA 1: Construction loan closing, groundbreaking and construction start of a minimum of one development project.
Year 3: 2021-22	\$345,450	15%	Phase I Project: Lease-up and stabilization
			NOFA 1: Construction loan closing, groundbreaking and construction start of a minimum of three development projects.
			NOFA 2: Release of NOFA for the remainder of the bond allocation – select 3-4 projects for funding.
			Site Acquisition: RFP for site(s) acquired by Washington County and/or Metro. Continue acquiring site(s) with Metro's participation and in collaboration with local jurisdictions for future RFPs
Year 4: 2022-23	\$345,450	15%	NOFA 1: Construction completion and Certificate of Occupancy of a minimum of two development projects.

			Site Acquisition: Sites where RFP is complete – construction loan closing, groundbreaking and construction start; release RFP for additional site(s) acquired by Washington County and/or Metro
			NOFA 2: Construction loan closing, groundbreaking and construction start of one project.
Year 5: 2023-24	\$230,000	10%	NOFA 1: Lease-up and stabilization of all NOFA 1 projects and close out of NOFA 1.
			Potential NOFA 3: Release of NOFA for any remaining bond allocation and select projects for funding
Year 6: 2024-25	\$230,000	10%	Site Acquisition: Construction completion and Certificate of Occupancy for initial RFP projects; construction loan closing and construction start for additional site(s) acquired by Washington County and/or Metro
Year 7: 2025-26	\$232,316	10%	NOFA 2: Construction completion and Certificate of Occupancy, Lease-up and stabilization
			Site Acquisition: Lease-up and stabilization for initial RFP projects
			Potential NOFA 3: Construction loan closing, groundbreaking and construction start

After recording return to:
Office of Metro Attorney
600 NE Grand Avenue
Portland, OR 97232-2736
Attn: _____

**DECLARATION OF AFFORDABLE HOUSING
LAND USE RESTRICTIVE COVENANTS**

This Declaration of Affordable Housing Land Use Restrictive Covenants (this "Declaration") is entered into as of _____, 2019 (the "Effective Date"), by and between Metro, a municipal corporation of the State of Oregon ("Metro") and _____ ("Owner").

RECITALS

A. Owner is the owner of certain real property commonly known as _____ in _____, Oregon, and legally described on Exhibit A attached hereto.

B. Owner and Metro are parties to that certain Intergovernmental Agreement dated _____, 20__ (the "IGA"), pursuant to which Metro provided to Owner certain funds applied by the Owner to acquire the Property, which funds were proceeds of certain general obligation bonds issued by Metro for the limited purpose of funding affordable housing projects as authorized by Measure 26-199 approved by the voters on November 6, 2019 (the "Ballot Title").

C. Owner plans to improve a ____ acre parcel [and modify an existing building from its current use as a _____] into [BRIEFLY DESCRIBE DEVELOPMENT PLAN].

D. The parties expect that the Property will be redeveloped and comprised of approximately _____ units of affordable housing (the "Project"). At initial occupancy, the Project will serve qualifying persons that earn ____% or less of area median income (AMI).

E. As required by the IGA, and as consideration for Metro's provision of general obligation bond funds to the Owner to acquire the Property, Owner agrees to the restrictions, covenants and obligations set forth herein.

**SECTION 1
PROPERTY USE RESTRICTIONS**

1.1 Affordable Housing Land Use. For the term of this Declaration, the Property and the Project shall at all times be owned, developed, constructed, improved and operated solely as "Affordable Housing" within the meaning of the Ballot Title and as described in the Metro Housing Program Work Plan approved by the Metro Council on January 31, 2019 (the "Work Plan"). For

purposes of the Ballot Title and the Work Plan, “Affordable Housing” is defined as improvements for residential units occupied by households earning 80% or less of median gross household income, adjusted for household size, for the Portland, Oregon metropolitan statistical area as established each year by the U.S. Department of Housing and Urban Development.

1.2 **Nondiscrimination.** In accordance with Title VI of the Civil Rights Act, as amended; 42 U.S.C. Section 2000d; Section 303 of the Age Discrimination Act of 1975, as amended; 42 U.S.C. Section 6102; Section 202 of the Americans With Disabilities Act of 1990; 42 U.S.C. Section 12132, no owner of the Property shall discriminate against any employee, tenant, patron or buyer of the Property improvements because of race, color, creed, national origin, sex, age or disability. In addition, any such owner shall comply, to the extent applicable to the Property, with the applicable federal implementing regulations of the above-cited laws and other applicable state and federal laws. “Owner” shall mean the fee simple title holder to the Property or any part thereof, including contract buyers, but excluding those having such interest merely as security for the performance of an obligation.

1.3 **Running with the Land.** Owner hereby declares that the Property subject to this Declaration shall be held, sold and conveyed subject to the forgoing land use restrictions and covenants, which shall run with the Property and shall be binding on all parties having or acquiring any right, title or interest in the Property or any part thereof, and shall inure to the benefit of Metro. Owner agrees that any and all requirements of the laws of the State of Oregon to be satisfied in order for the provisions of this Declaration to constitute deed restrictions and covenants running with the land shall be deemed to be satisfied in full, and that any requirements of privileges of estate are intended to be satisfied, or in the alternate, that an equitable servitude has been created to ensure that these restrictions run with the Property for the term of this Declaration.

SECTION 2 GENERAL PROVISIONS

2.1 **Enforcement.** Metro shall have standing, and may bring an action at law or equity in a court of competent jurisdiction to enforce all restrictions and covenants established by this Declaration and to enjoin violations, ex parte, if necessary. The failure to enforce any provision shall in no event be deemed a waiver of the right to do so thereafter. If legal proceedings of any type are begun so as to enforce the Declaration, the prevailing party shall recover reasonable attorney’s fees, including attorney’s fees on appeal. However, attorney’s fees shall not be recovered by a prevailing party that initiated the legal proceedings unless the initiating party provided 30 days’ written notice to the other party, its successors, and assigns, prior to filing any legal action.

Metro is the only party entitled to enforce the restrictions and covenants set forth herein. Nothing in this Declaration gives, is intended to give, or will be construed to give or provide any benefit or right, whether directly, indirectly, or otherwise, to third persons.

2.2 **Duration.** Subject to the provisions of the IGA providing for the early termination of this Declaration upon the occurrence of certain events or conditions, or otherwise upon mutual consent of the parties, the restrictions established by this Declaration shall run with and bind the Property in perpetuity.

2.3 **Amendment.** This Declaration may not be amended or revoked except by written

2.4 Limitation of Liability of Metro. Under no circumstances shall Metro have any liability to Owner, its successors and assigns, or other user or tenant, lessee, guest or invitee of Owner, its successors and assigns, by virtue of Metro's enforcement or failure to enforce the rights established by this Declaration, and Owner, its successors and assigns, should defend and hold harmless Metro from same.

2.6 Breach of Agreements. Owner represents and warrants that this Declaration does not violate any of the terms or conditions of any other agreement to which Owner is a party, or to which the Property is subject.

Title:

This instrument was acknowledged before me on _____, 2019, by _____, as _____, of _____, an Oregon _____.

Page 3 of 5

METRO

By: _____

Name: _____

Title: _____

State of Oregon)
 ss.
County of _____)

 This instrument was acknowledged before me on _____, 2019, by
_____, as _____, of _____, an Oregon _____.

(Signature of Notarial Officer)

Exhibit A

Property Legal Description

Required Project Completion Reporting

Immediate Post Closing (within 10 business days after closing):

- ☐ Copy of recorded Metro approved restrictive covenant
- ☐ Copy of settlement statement

Post Construction Completion (within 3 months of recorded temporary certificate of occupancy):

- ☐ Metro project closeout form attesting to use of Metro bond funds for capital costs
- ☐ Copy of temporary certificate of occupancy
- ☐ Resident Services Plan (OHCS form)
- ☐ Affirmative Fair Housing Marketing Plan (HUD Form)
- ☐ Community engagement report
- ☐ MWESB/COBID participation outcomes
- ☐ Workforce outcomes report, if project has stated workforce goals
- ☐ Draft project summary

Post-Occupancy (within 3 months of 95% occupancy):

- ☐ Marketing and application outcomes report
- ☐ Final project summary