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CITY OF  
**PORTLAND, OREGON**  
PORTLAND HOUSING BUREAU

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To: City Council

From: Commissioner Nick Fish

RE: Portland Housing Bureau's Fall BMP Submittal

Date: Monday, October 4, 2010

The Portland Housing Bureau (PHB) has prepared the attached report as requested by the Office of Management and Finance for the Fall Budget Monitoring Process (BMP). PHB's submission can be broken into two major categories – budget status reporting and budget amendment requests.

#### **Budget Status Reporting**

PHB's Fall BMP submission includes several required status-reporting components. The first requirement is an explanation of variances between the FY 2009/10 Revised Budget and PHB's actual expenditures and revenues. The attached Prior Year Reconciliation reports describe these variances in detail, but the key point is that PHB did not overspend any appropriations at the fund level.

The remaining two reporting exercises provide final status updates on FY 2009/10 decision packages and service improvement plans. For both, PHB reported substantial accomplishment of goals and target outcomes.

#### **Budget Amendment Requests**

PHB's Fall BMP submission also includes a number of requests for adjustments to the FY 2010/11 Adopted Budget. In addition to technical adjustments with no budgetary impact at the bureau level, PHB is requesting a number of additions to current appropriations. Several of these adjustments are reflective of the transition of funding from PDC to PHB, as well as the timing nuances that are part of housing development projects. This volume of adjustments is higher than PHB would like to see; staff, however, will work to tighten up internal processes to reduce the volume of future adjustments – especially in the area of tax increment financed projects. Below is a brief description of adjustments:

##### General Fund

- **\$552,507** in general fund carryover for encumbered contracts. These include \$218k for HAP's "Key Not A Card" program, \$85k for Cascadia Behavioral Health services and \$130k for Salvation Army and Red Cross emergency shelter services.
- **\$75,000** of new Multnomah County revenues for outreach and engagement activities aimed at connecting persons experiencing homelessness with services.

##### Housing Investment Fund

- **\$325,142** in HIF encumbrance carryover and rebudget for the Eastgate Station and Clifford Apartments projects.
- **\$400,000** of Housing Investment Fund resources for investment in improvements to loan servicing software application

- **\$4,069,939** in Section 108 encumbrance carryover and rebudget. \$1.98M will fund the Roselyn, Walnut Park, and Upshur House preservation projects; the remaining \$2.08M to be made available through the Fall Notice of Funds Availability (NOFA) process.

#### Federal Grants Fund

- **\$1,307,583** in NSP grant rebudget carryover for affordable homeownership development.
- **\$439,969** in HPRP grant encumbrance carryover for short-term rent assistance programs.
- **\$506,897** in Lead Hazard grant rebudget carryover for single-family and rental lead abatement programs.

#### CDBG Fund

- **\$440,942** in CDBG-R stimulus fund encumbrance carryover. \$297k will support the Hewitt Place project, \$57k will fund Economic Opportunity programs and \$87k will be awarded through the Fall NOFA.
- **\$234,445** in CDBG encumbrance carryover for ongoing contracts and projects such as HDC asset management portfolio analysis and Proud Ground and Hacienda homebuyer assistance programs.
- **\$896,429** in CDBG prior year entitlement funding to be made available through the Fall NOFA process.

#### HOME Fund

- **\$1,111,333** in HOME rebudget carryover and program income for the Rockwood Apartments project.
- **\$400,000** in HOME rebudget carryover for Villa de Suenos.
- **\$1,093,1718** in HOME rebudget carryover for Gresham HOME projects

#### Urban Renewal Area (URA) Tax Increment Financing

- **\$200,790** rebudget carryover in the Downtown Waterfront URA for future affordable housing projects.
- **\$151,135** rebudget carryover in the North Macadam URA for Block 49 Veterans Housing.
- **\$13,428,038** rebudget carryover in the River District URA, including \$12.9M for the Resource Access Center and \$500k to be made available through the Fall NOFA process.
- **\$4,070,828** rebudget carryover in the South Park Blocks URA, including \$2.65M for the Chaucer Apartments and \$587k for the University Place project.
- **\$3,371,760** rebudget carryover in the Convention Center URA, including \$2.37M for the Miracles Club project and \$414k for King/Parks Affordable Housing.
- **\$53,725** reduction in Central Eastside URA budget to offset overspending in FY 2009/10 on the Clifford Apartments Rehab project.
- **\$355,489** rebudget carryover in the Lents URA, including \$198k for The Glen Apartments
- **\$3,157,794** reduction in the Interstate URA budget, including a \$5M decrease to recognize transfer of responsibility for the Killingsworth Station project to PDC and \$1.85M carryover for ongoing affordable housing projects such as Bridge Meadows.
- **\$46,619** rebudget carryover in the Gateway URA for the Gateway/Glisan project.

Should you have any questions about the PHB BMP submittal, please contact Alissa Mahar at 823-4160 or Mike Johnson at 823-4176.

# BUDGET AMENDMENT REQUEST

Portland Housing Bureau

PERIOD Fall BuMP

FISCAL YEAR FY 2010-11

## HC\_001 - Encumbrance Carryover - Grants

PHB requests Council approval to carryover appropriation associated with grant-funded encumbered contracts. The majority of the funding requested is HPRP funding for rent assistance programs and CDBG funding for culturally-specific homebuyer education & assistance programs.

Dollar Amount: \$723,687  
Type: Encumbrance Carryover Request  
Resources: Grants

## HC\_002 - Encumbrance Carryover - General Fund

PHB requests Council approval for General Fund appropriation carryover to fund encumbered contracts. These contracts include \$218k for HAP's "Key Not A Card" program, \$130k for Salvation Army and Red Cross emergency shelter services, \$85k for Cascadia Behavioral Health services and \$45k for the PHB strategic plan.

Dollar Amount: \$552,507  
Type: Encumbrance Carryover Request  
Resources: General Fund Discretionary

## HC\_003 - Encumbrance Carryover - New Revenues

PHB requests Council approval to carryover Section 108 Loan Guarantee and Housing Investment Fund resources to fund encumbered contracts. These contracts support the Roselyn Renewal, Walnut Park and Eastgate Station affordable housing projects.

Dollar Amount: \$195,081  
Type: Encumbrance Carryover Request  
Resources: New Revenues

## HC\_004 - Technical Adjustments

PHB requests Council approval for budget-neutral technical adjustments to PHB's budget. These requests will serve to allocate existing grant resources to specific projects and contracts.

Dollar Amount: \$0  
Type: Technical Adjustment  
Resources: Internal Transfer

# BUDGET AMENDMENT REQUEST

Portland Housing Bureau

PERIOD Fall BuMP

FISCAL YEAR FY 2010-11

## HC\_005 - New Requests - New Revenues

PHB requests Council approval for a number of increases and several decreases to budgeted appropriations. These requests are necessary for two primary reasons. The first is that management of TIF affordable housing development shifted to PHB on July 1, 2010, necessitating the transfer of unexpended FY 2009/10 TIF project budgets to PHB. The second is that the nature and timelines of housing development often requires project funding be carried across fiscal years. The most significant of PHB's requests are to:

- Carry over \$12.9M of TIF resources for the Resource Access Center
- Reduce Interstate URA resources by \$5.0M to recognize transfer of responsibility for the Killingsworth Station project to PDC
- Carry over \$3.6M of Section 108 loan program resources for multiple affordable housing projects
- Carry over \$2.4M of TIF resources for the OCC Miracles Club project
- Carry over \$1.1M of TIF resources for Bridge Meadows
- Carry over \$2.7M of TIF resources for the Chaucer Apartments
- Carry over \$1.0M of NSP grant resources for the Proud Ground-NAYA homeownership project
- Appropriate \$1.1M of prior year Gresham HOME allocations for the Gresham HOME contract
- Appropriate \$561k of prior year HOME resources and \$550k of program income for the Rockwood Apartments project

Dollar Amount: \$30,008,040  
Type: New Request  
Resources: New Revenues

**Prior Year Business Area Reconciliation Report  
FY 2010-11 Fall BMP - General Fund**

	FY 2009-10 Revised Budget	FY 2009-10 Year-End Actuals	Percent of Actuals to Revised
<b>Portland Housing Bureau</b>			
<b>EXPENDITURES</b>			
Personal Services	\$227,727	\$225,372	99%
External Materials and Services	\$12,074,700	\$11,349,596	94%
Internal Materials and Services	\$701,573	\$625,349	89%
Capital Outlay	\$0	\$12,155	0%
<b>TOTAL EXPENDITURES</b>	<b>\$13,004,000</b>	<b>\$12,212,472</b>	<b>94%</b>
<b>REVENUES</b>			
Intergovernmental Revenues	\$90,036	\$68,716	76%
Interagency Revenue	\$11,500	\$11,500	100%
Miscellaneous	\$0	\$1,121	0%
General Fund Discretionary	\$12,902,464	\$0	0%
<b>TOTAL REVENUES</b>	<b>\$13,004,000</b>	<b>\$81,337</b>	<b>1%</b>

**Bureau Reconciliation Narrative**

INTERNAL M&S - PHB budgeted its \$150k interagency agreement with the EBS division of OMF for the MITAS-SAP interface development in the general fund. However, at the end of the fiscal year when the expense was billed, PHB chose to record 50% of this in the TIF fund as this expense was eligible for TIF reimbursement under the PHB-PDC transition IGA. Thus, the general fund appropriation was underspent.

CAPITAL OUTLAY - The expense booked in this category is associated with GASB 51 and recording the value of bureau trademarks (e.g., housing connections web application). This expense was recorded in August by OMF Central Accounting, well after the bureau had an opportunity to shift appropriation to back this expense.

INTERGOVERNMENTAL REVENUES - This appropriation was over-budgeted b/c PHB had double-budgeted a \$16k Gresham contribution to the bureau for PHB's administration of the Portland Consortium and Housing and Community Development Commission.

**Prior Year Business Area Reconciliation Report  
FY 2010-11 Fall BMP - Federal Grants Fund**

	FY 2009-10 Revised Budget	FY 2009-10 Year-End Actuals	Percent of Actuals to Revised
<b>Portland Housing Bureau</b>			
<b>EXPENDITURES</b>			
Personal Services	\$608,135	\$539,622	89%
External Materials and Services	\$9,645,501	\$5,912,183	61%
<b>TOTAL EXPENDITURES</b>	<b>\$10,253,636</b>	<b>\$6,451,805</b>	<b>63%</b>
<b>REVENUES</b>			
Intergovernmental Revenues	\$10,253,636	\$6,486,903	63%
<b>TOTAL REVENUES</b>	<b>\$10,253,636</b>	<b>\$6,486,903</b>	<b>63%</b>

**Bureau Reconciliation Narrative**

**PERSONAL SERVICES** - This salary appropriation was underspent due to less-than-anticipated staff time being charged to several grant-funded programs. Staff spent less time on administering these programs because the programs themselves underspent appropriation over the course of the fiscal year. (See External M&S below.)

**EXTERNAL M&S** - This variance is due to underspending in several grant-funded programs. These include lead abatement services, NSP-funded homeownership activities, HPRP-funded rent assistance services, OHCS-funded rental access activities and HOPWA-funded rental access and stabilization programs.

**INTERGOVERNMENTAL REVENUES** - The programs tracked in this fund are funded on a 100% reimbursement basis. Thus, since expenses were less-than-budgeted (see above), the revenues too were less-than-budgeted.

**Prior Year Fund Reconciliation Report  
Portland Housing Bureau - FY 2010-11 Fall BMP**

	FY 2009-10 Revised Budget	FY 2009-10 Year-End Actuals	Percent of Actuals to Revised
<b>Housing Investment Fund</b>			
<b>EXPENDITURES</b>			
Personal Services	\$422,023	\$296,415	70%
External Materials and Services	\$15,824,711	\$7,490,875	47%
Bond Expenses	\$8,150,000	\$5,206,861	64%
Fund Transfers - Expense	\$927,599	\$926,812	100%
<b>TOTAL EXPENDITURES</b>	<b>\$25,324,333</b>	<b>\$13,920,963</b>	<b>55%</b>
<b>REVENUES</b>			
Budgeted Beginning Fund Balance	\$1,138,634	\$0	0%
Charges for Services	\$0	\$7,000	0%
Intergovernmental Revenues	\$537,100	\$979,498	182%
Bond and Note	\$14,471,000	\$7,506,731	52%
Miscellaneous	\$9,177,599	\$6,295,434	69%
<b>TOTAL REVENUES</b>	<b>\$25,324,333</b>	<b>\$14,788,663</b>	<b>58%</b>

**Fund Reconciliation Narrative**

**PERSONAL SERVICES** - This variance has two explanations. First, the principal financial analyst and housing program manger were both partly budgeted in the HIF and both positions remained vacant for significant portions of the year. Second, PHB staff charge time in direct relation to their actual allocation of time to different projects; thus, the savings are reflective of a slight variance work anticipated (i.e., budget) and the actual work performed.

**EXTERNAL M&S** - This variance has two chief causes. First, the bureau appropriation for the Section 108 loan program was \$6.47M. The bureau, however, only disbursed \$2.4M in FY10 due to challenges PHB experienced in finding projects and developers that could meet the requirements of Section 108 loans.

Second, the bureau saw less-than-anticipated activity in the "HLOC" (homeownership line of credit) in the early part of FY10 and then officially eliminated the HLOC program in the final quarter of the fiscal year. Thus, actuals were lower-than-budgeted. (Note: HLOC activity was a four-step process that saw activity recorded in two revenue and two expense categories: bond and note revenues for the initial credit draw; external M&S to disburse funds to PDC; bond expenses to repay the credit draw; and miscellaneous revenues to record proceeds from the sale of the mortgage to Fannie Mae.)

**BOND EXPENSES** - This variance is due to reduced HLOC activity. (See "External M&S" above.) The result was less-than-anticipated expenses associated with HLOC draw repayments to the creditor.

**INTERGOVERNMENTAL REVENUES** - This variance was due to a Spring BMP request made in error. The appropriation was originally \$990,100 to account for both HIF program income and an initial HIF balance transfer (both from PDC). PHB received both these transfers from PDC, but PHB mistakenly reduced this appropriation in the Spring BMP, thinking this appropriation was double-budgeted.

**BOND & NOTE REVENUES** - This variance has two sources. The first is due to the less-than-anticipated Section 108 loan activity. (See "External M&S" above.) The lessened program activity resulted in less-than-anticipated loan proceeds booked in this revenue category.

The second relates to the HLOC program. (See "External M&S" above.) The lessened program activity resulted in less-than-anticipated line of credit revenues being booked in this revenue category.

**MISCELLANEOUS REVENUES** - This variance is due to lessened HLOC program activity. (See "External M&S" above.) The lessened program activity resulted in less-than-anticipated revenues associated with the sale of HLOC-facilitated mortgages to Fannie Mae.

**Prior Year Fund Reconciliation Report  
Portland Housing Bureau - FY 2010-11 Fall BMP**

	FY 2009-10 Revised Budget	FY 2009-10 Year-End Actuals	Percent of Actuals to Revised
<b>Housing Community Development Fund</b>			
<b>EXPENDITURES</b>			
Personal Services	\$1,353,619	\$1,239,070	92%
External Materials and Services	\$9,997,237	\$8,925,539	89%
Internal Materials and Services	\$255,904	\$247,185	97%
Bond Expenses	\$9,000	\$3,856	43%
Fund Transfers - Expense	\$235,000	\$0	0%
<b>TOTAL EXPENDITURES</b>	<b>\$11,850,760</b>	<b>\$10,415,650</b>	<b>88%</b>
<b>REVENUES</b>			
Intergovernmental Revenues	\$11,850,760	\$10,653,293	90%
Miscellaneous	\$0	\$20,940	0%
<b>TOTAL REVENUES</b>	<b>\$11,850,760</b>	<b>\$10,674,234</b>	<b>90%</b>

**Fund Reconciliation Narrative**

**EXTERNAL M&S** - This expense category was underspent for two primary reasons. First, several contracts (e.g., PDC for affordable housing and economic opportunity programs) left \$335k unspent; PHB is requesting these funds be carried over to support the ongoing programs (either in the PHB budget for housing or in the PDC contract for economic opportunity). Second, a number of contracts were extended beyond June 30th; PHB is requesting this \$212k appropriation be carried forward as encumbrance carryover.

**BOND EXPENSES** - Section 108 loan principal and interest payments were less-than-anticipated because PHB experienced challenges in finding projects and developers that could meet the requirements for a Section 108 loan.

**FUND TRANSFERS** - Per agreement between PHB and the OMF financial planning division, the budgeted general fund overhead expense for the CDBG fund was not charged in FY 2009/10.

**INTERGOVERNMENTAL REVENUES** - The programs tracked in this fund are funded on a 100% reimbursement basis. Thus, since expenses were less-than-budgeted (see above), the revenues too were less-than-budgeted.

**MISCELLANEOUS REVENUES** - These unanticipated revenues are generated by liens associated with the neighborhood inspections code enforcement activities funded by CDBG.



**Prior Year Fund Reconciliation Report  
Portland Housing Bureau - FY 2010-11 Fall BMP**

	FY 2009-10 Revised Budget	FY 2009-10 Year-End Actuals	Percent of Actuals to Revised
<b>HOME Grant Fund</b>			
<b>EXPENDITURES</b>			
Personal Services	\$375,529	\$368,931	98%
External Materials and Services	\$8,510,786	\$5,980,965	70%
<b>TOTAL EXPENDITURES</b>	<b>\$8,886,315</b>	<b>\$6,349,896</b>	<b>71%</b>
<b>REVENUES</b>			
Intergovernmental Revenues	\$8,886,315	\$11,025,610	124%
<b>TOTAL REVENUES</b>	<b>\$8,886,315</b>	<b>\$11,025,610</b>	<b>124%</b>

**Fund Reconciliation Narrative**

EXTERNAL M&S - The PHB HOME appropriation was underspent due to delays in the Rockwood Apartments and Villa de Suenos affordable housing projects. PHB is requesting these appropriations be carried over in the FY 2010/11 Fall BMP.

INTERGOVERNMENTAL REVENUES - This revenue category shows activity exceeded budget due to a mistake in accrual processing for FY 2008/09. PHB processed payments to PDC for FY 2008/09 services (Sacred Heart and Eastgate Station projects) after 7/1/09. Through the revenue accrual process, the revenue should have been accrued to FY 2008/09 and a negative revenue should have been booked in FY 2009/10 to offset the eventual reimbursement. However, the negative revenue was not booked in FY 2009/10; thus, FY 2009/10 revenues are overstated.

**Prior Year Fund Reconciliation Report  
Portland Housing Bureau - FY 2010-11 Fall BMP**

	FY 2009-10 Revised Budget	FY 2009-10 Year-End Actuals	Percent of Actuals to Revised
<b>Tax Increment Financing Reimbursement</b>			
<b>EXPENDITURES</b>			
Personal Services	\$296,632	\$277,054	93%
External Materials and Services	\$110,104	\$110,031	100%
Internal Materials and Services	\$458,138	\$458,090	100%
<b>TOTAL EXPENDITURES</b>	<b>\$864,874</b>	<b>\$845,175</b>	<b>98%</b>
<b>REVENUES</b>			
Intergovernmental Revenues	\$814,874	\$849,999	104%
Fund Transfers - Revenue	\$50,000	\$50,000	100%
Miscellaneous	\$0	(\$1,132)	0%
<b>TOTAL REVENUES</b>	<b>\$864,874</b>	<b>\$898,867</b>	<b>104%</b>

**Fund Reconciliation Narrative**

MISCELLANEOUS REVENUES - This fund saw negative interest accrued due to fluctuations in fund balance. PHB transferred \$50,000 of float from the HIF to the TIF early in the fiscal year, but the fund balance did fall below zero at points over the FY.

## Portland Housing Bureau - FY 2010-11 Fall BMP

### Prior Year Decision Package Status Update

Decision Package	Description	FTE	GF Ongoing	GF One Time	Other Rev	Total	Status Update
<b>HC_01 - Homeless to Housing Package 1</b>	This request maintains current safety net capacity for outreach, engagement and supportive services bundled with rental assistance to identify medically vulnerable, chronically homeless adults and move them from streets and shelters into permanent housing.	0	0	0	500,000	<b>500,000</b>	Contracts completed and fully spent on time. Contractors exceeded annual goals. <b>Outcomes Jul 09-Jun 10:</b> 90 chronically homeless individuals placed into permanent housing. 86% of program participants retained housing 6 months after placement.
<b>HC_02 - Homeless to Housing Package 2</b>	Short-term rental assistance for families, women, and mentally ill persons to cover move-in and short term rental subsidies to allow successful transition from homelessness into permanent rental housing.	0	498,548	0	0	<b>498,548</b>	Contracts completed and fully spent on time. Contractors met or exceeded annual goals. <b>Outcomes Jul 09-Jun 10:</b> 94 homeless households placed into permanent housing. 91% of program participants retained housing 6 months after placement.
<b>HC_03 - Homeless to Housing Package 3</b>	This request maintains current capacity of rent assistance and supportive services targeting homeless women and mentally ill adults. Case management and supportive housing to move them into housing from homelessness, or to support housing retention of formerly homeless persons.	0	501,452	16,067	0	<b>517,519</b>	Contracts completed and fully spent on time. Contractors met or exceeded annual goals. <b>Outcomes Jul 09-Jun 10:</b> 126 homeless households placed into permanent housing. 91% of program participants retained housing 6 months after placement.
<b>HC_04 - Shelters to Housing</b>	Short-term rental assistance for youth, families with children, and single women and men who are staying in City-funded shelters to move into permanent rental housing. These flexible client/rental assistance funds cover applications, move-in costs, short term rental subsidies and other needs to maximize successful transition from shelters into permanent housing.	0	0	322,038	0	<b>322,038</b>	Contracts completed and fully spent on time. Contractors met or exceeded annual goals. <b>Outcomes Jul 09-Jun 10:</b> 313 homeless households placed into permanent or transitional housing. 94% of program participants retained housing 6 months after placement.
<b>HC_05 - Housing Services Package</b>	This request continues funding for a range of services that provide information and referral, advocacy and case management for low-income renters confronting homelessness, eviction, housing discrimination and unhealthy housing conditions. The Housing Access and Stabilization programs assist low-income individuals and households, many with rental screening barriers (poor credit, evictions, criminal history) obtain and retain housing.	0	0	396,800	0	<b>396,800</b>	Contracts completed and fully spent on time. Contractors met or exceeded annual goals. <b>Outcomes Jul 09-Jun 10:</b> 47,286 households received access and stabilization services including information and referral through the 211 phone line, shared housing and relocation program housing placement, and access to housing with the assistance of the landlord guarantee.

## Portland Housing Bureau - FY 2010-11 Fall BMP

### Prior Year Decision Package Status Update

Decision Package	Description	FTE	GF Ongoing	GF One Time	Other Rev	Total	Status Update
<b>HC_06 - Youth Employment Opportunity</b>	This request continues employer-linked training program for high risk and homeless youth in life skills, remedial education and job skills coordinated by intensive case management	0	0	0	225,000	<b>225,000</b>	Contract provided workforce assistance to low-income youths. Twenty-eight low-income youths received remedial education and job skills and increased their incomes
<b>HC_07 - Economic Opportunity Partnered Services</b>	This request continues Economic Opportunity Initiative partnered services. Funded services include marketing assistance for emerging microenterprises and Project Clean Slate, which assists workforce participants with clearing employment barriers from their criminal records.	0	0	0	100,000	<b>100,000</b>	Contract provided expedited assistance to EOI participants to remove minor criminal, driver's license and other civil judgements (i.e., barriers to employment and business success) from their records.
<b>HC_08 - Homeless Supportive Services</b>	This request continues funding for two critical service programs: BEST program - which assists disabled residents with speedy access to SSI benefits - and for Oregon Community Warehouse, which provides furnishings and home goods for homeless moving into permanent housing.	0	0	296,350	0	<b>296,350</b>	Contracts completed and fully spent on time. Contractors met or exceeded annual goals. <b>Outcomes Jul 09-Jun 10:</b> 147 BEST participants secured SSI/SSDI benefits by program exit. 773 homeless households received furnishings at move-in to permanent housing.
<b>HC_09 - School Stabilization Program</b>	This request continues funding for school based rent assistance (formerly SFH Stabilization Program), which makes rent assistance available at schools with high student mobility rates to prevent student families from becoming homeless or having to relocate during the school year.	0	0	0	500,000	<b>500,000</b>	Contract is underway and spending on time. Contract was amended to add an additional year and an additional \$500,000 in funding to fully obligate HPRP funds through FY10-11. Contractors are on track to meet or exceed annual goals. <b>Outcomes Jul 09-Jun 10:</b> 128 households placed into housing or prevented from becoming homeless. School retention outcomes forthcoming following close of school year.
<b>HC_10 - Homeless Women Shelter Services</b>	This request maintains current capacity for Women's year-round shelter.	0	0	244,333	0	<b>244,333</b>	Contract completed and fully spent after one-month contract extension. Contractors met or exceeded annual goals. <b>Outcomes Jul 09-Jun 10:</b> 314 unduplicated homeless women served in emergency shelter. Daily average of 52 women accessing shelter and 45 women accessing day services including lockers, showers, and case management services.

**Portland Housing Bureau - FY 2010-11 Fall BMP**

*Prior Year Decision Package Status Update*

Decision Package	Description	FTE	GF Ongoing	GF One Time	Other Rev	Total	Status Update
<b>HC_11 - Homeless Men's Shelter Services</b>	This request maintains current capacity for Men's year-round shelter.	0	0	111,814	0	<b>111,814</b>	Contracts completed and fully spent on time. Contractors met or exceeded annual goals. <b>Outcomes July 09-Jun 10:</b> 138 homeless men received mental health services. 187 homeless men placed in permanent or transitional housing.
<b>HC_12 - Winter Shelter Services</b>	This request maintains current capacity for added Winter shelters for men and women.	0	0	273,075	0	<b>273,075</b>	Contracts completed and fully spent on time. Contractors met or exceeded annual goals. <b>Outcomes Jul 09-Jun 10:</b> 791 homeless individuals sheltered in seasonal warming center. 107 homeless women sheltered in winter expansion of SAFES shelter. 11 medically vulnerable homeless households assisted with supportive housing, meals, and onsite nursing care.
<b>HC_13 - Severe Weather Shelter Services</b>	This request maintains current capacity for severe weather shelter - 10 to 20 nights per year of severe weather (may include a minimal percentage for summer cooling center).	0	0	75,000	0	<b>75,000</b>	Contract extended to April 15, 2011, and additional FY10-11 funds will be added through amendment. All FY09-10 contracted work completed March 31. <b>Outcomes Jul 09-Jun 10:</b> Red Cross operated severe weather shelter for 8 nights in December 2009 and January 2010, sheltering up to 138 homeless individuals nightly.
<b>HC_14 - Youth Shelter Pass-through</b>	This request maintains City pass-through to support current capacity in Multnomah County's youth shelter system.	0	0	223,175	0	<b>223,175</b>	Contract completed and fully spent on time. Subcontractor exceeded annual goals. <b>Outcomes Jul 09-Jun 10:</b> 230 homeless youth served in emergency shelter.
<b>HC_17 - Operation Home</b>	This request renews OTO funding for Homebuyer access programming to provide outreach and marketing, education and counseling to potential low-income homeowners, with an emphasis on minority first-time home buyers.	0	0	500,000	0	<b>500,000</b>	PHB awarded funds to contractors (e.g., Habitat for Humanity, Native American Youth & Family Center, Portland Housing Center, Proud Ground, HOST, and the Minority Homeownership Assistance Collaborative) based upon demonstrated ability to reach communities of color. 3 of the 5 contracts have been extended until 12/31/2010, but bulk of deliverables have been met. <b>Outcomes:</b> 1200 attendees at 5 homebuyer fairs; 1011 attendees at home buyer education classes; 1435 recipients of financial counseling, 228 of which completed "financial fitness" classes; and 668 became new homeowners.

**Portland Housing Bureau - FY 2010-11 Fall BMP**

*Prior Year Decision Package Status Update*

Decision Package	Description	FTE	GF Ongoing	GF One Time	Other Rev	Total	Status Update
<b>HC_18 - Transitional Housing Youth Pass-through</b>	This request continues the City's pass-through to Multnomah County to support youth transitional housing.	0	0	680,294	0	<b>680,294</b>	Contract completed and fully spent on time. Subcontractor exceeded annual transitional housing output goals, but struggled with housing placement goals due primarily to the recession and Oregon's high unemployment rates (particularly high among entry-level workers). <b>Outcomes Jul 09-Jun 10:</b> 92 homeless youth housed in transitional housing. 34 youth exited to permanent housing; 40 youth exited to other stable housing.
<b>HC_19 - SAFE Services</b>	This request renews OTO funding for SAFE workgroup initiatives such as day shelter services and Rose City Resource Guide.	0	0	162,600	0	<b>162,600</b>	Contracts completed and fully spent on time. Contractors met or exceeded annual goals. <b>Outcomes Jul 09-Jun 10:</b> 60,000 copies of the Rose City Resource guide printed and distributed. Daily point-in-time average of 61 individuals engaged in day services including showers, lockers and shaving station.
<b>HC_20 - Public Safety and Livability Services</b>	This request renews funding for Syringe Exchange.	0	0	63,037	0	<b>63,037</b>	Outside In contract for needle exchange completed and fully spent on time. Contractor exceed annual goals. <b>Outcomes Jul 09-Jun 10:</b> 34,702 needle exchange visits; 557,941 syringes exchanged.
<b>HC_27 - Housing Bureau Transistion Costs</b>	None Available.	0	0	359,403	697,216	<b>1,056,619</b>	The transition and integration of the former BHCD and PDC housing operations is well underway. Effective November 2009, the two respective units transitioned both into a shared office space and into a new organizational structure. This decision package, specifically, funded the costs of establishing and moving into the new office space; integration of PDC IT resources into the City; execution of a strategic planning process; staff resources directed to transition and integration activities; and other costs.

**Portland Housing Bureau - FY 2010-11 Fall BMP**

*Prior Year Decision Package Status Update*

Decision Package	Description	FTE	GF Ongoing	GF One Time	Other Rev	Total	Status Update
<b>HC_28 - HPRP Stimulus Addtl. Rent Asst. Capacity</b>	None Available.	0	0	353,873	1,137,000	<b>1,490,873</b>	Contract is underway and spending on time. Contract was amended to add an additional year and an additional \$1,473,114 in funding to fully obligate HPRP funds through FY10-11. Subcontractors on track to meet or exceed annual goals. <b>Outcomes Jul 09-Jun 10:</b> 204 homeless households placed into housing , and 522 households prevented from becoming homeless.
<b>HC_29 - Stimulus Housing Project</b>	None Available.	0	0	500,000	0	<b>500,000</b>	Funding was been expended to provide critical services in conjunction with efforts to transition homeless clients with specific needs into permanent supportive housing.
<b>HC_30 - CDBG Stimulus Economic Opportunity Project</b>	None Available.	0	0	0	375,000	<b>375,000</b>	Contracts with Open Meadow, Mt Hood Community College, Outside In and Lewis and Clark are underway. CDBG-R funds provide occupational training and job placement services. A portion of these ARRA funds were carried over from 09-10 and are reported on quarterly for stimulus reporting.
<b>HC_31 - CDBG Swap with PBOT</b>	None Available.	0	0	0	1,500,000	<b>1,500,000</b>	PHB is providing CDBG resources to PBOT and received \$1.5M general fund in return. The general fund resources supported FY 2009/10 homeless services such as short-term rent assistance, shelter services and transitional housing. The CDBG resources were budgeted for the Cully Boulevard Green Street Project, which rebuilds NE Cully Boulevard between NE Prescott Street and NE Killingsworth Street. Construction on this project was delayed and as a result, PHB removed this \$1.5M appropriation from the bureau budget in the Spring BMP and added it to the FY 2010/11 Adopted Budget. Construction began in July 2010.

## Portland Housing Bureau - FY 2010-11 Fall BMP

### *Prior Year Service Improvement Plan Update*

#	Description	Status Update
1	<p>Improve customer service to subrecipient contract holders by improving turnaround times on contract processing as evaluated through the Amanda contract tracking system</p>	<p>PHB has made a number of improvements to the contracting process. In FY2008-09, it took the bureau an average of 75 calendar days to fully process a contact. In FY 2009/10, contract processing improved to an average of 30 calendar days. Furthermore, contracts were processed in an average of 14 calendar days if Council action was not required; if Council action was necessary, the process takes approximately 30 calendar days. The bureau has also addressed issues with contract invoice processing, improving the turnaround times from approximately 3 weeks to 1 week.</p>
2	<p>Improve coordination of housing policy, planning, and communications through transition of bureau into new organizational structure as evaluated through stakeholder feedback and surveys.</p>	<p>PHB has already begun to see the benefits of working under the same roof with former-PDC employees. PHB established the Strategic Policy &amp; Planning Division of the bureau to provide enhanced coordination of policy and planning. PHB also established a Public Information Officer position to improve internal and external communications. The bureau has recognized opportunities for greater coordination among staff to improve policy discussions and outcomes. And in April, the bureau kicked off a comprehensive and community-focused strategic planning process (slated for completion by October). The bureau's strategic plan will serve as the blueprint for PHB's mission, vision, values, strategies, organizational structure and budget over the next five years.</p>
3	<p>Improve efficiency by analyzing cost effectiveness of rental assistance programs and better review of results as evaluated through HMIS data to compare along established measurable outcomes.</p>	<p>The PHB HMIS ("homeless management information system") team has developed a series of standard reports for both PHB and HAP to assist in program effectiveness evaluation. The short term rent assistance program has overall program outcomes of 84% retention at 12 months compared to other "Continuum of Care" programs with a rate of 75% for FY 2009/10.</p>



**Portland Housing Bureau - FY 2010-11 Fall BMP**  
*General Fund Encumbrance Carryover Detail Spreadsheet*

Vendor Name	PO #	GF Encumbrances Carried Forward	Fall BMP Request Amt
211 INFO	22021635	\$16,762	
	22024463	\$4,057	
211 INFO Total		\$20,819	\$0
AFRICAN AMERICAN ALLIANCE FOR	22023485	\$26,916	
AFRICAN AMERICAN ALLIANCE FOR Total		\$26,916	\$0
AMERICAN RED CROSS -	22032402	\$21,339	
AMERICAN RED CROSS - Total		\$21,339	\$21,339
BUREAU OF LABOR & INDUSTRIES	22031271	\$17,715	
BUREAU OF LABOR & INDUSTRIES Total		\$17,715	\$17,715
CASCADIA BEHAV HEALTHCARE INC	22025214	\$151,972	
CASCADIA BEHAV HEALTHCARE INC Total		\$151,972	\$84,583
CENTRAL CITY CONCERN	22000986	\$2,029	
	22030169	\$49,124	
CENTRAL CITY CONCERN Total		\$51,153	\$0
COMMUNITY HOUSING RESOURCE CENTER	22037325	\$30,000	
COMMUNITY HOUSING RESOURCE CENTER Total		\$30,000	\$0
ECUMENICAL MINISTRIES OF OR	22021775	\$4,630	
	22023698	\$18,494	
ECUMENICAL MINISTRIES OF OR Total		\$23,124	\$0
FAIR HOUSING COUNCIL OF OREGON	22024650	\$1,917	
FAIR HOUSING COUNCIL OF OREGON Total		\$1,917	\$0
FIRST PRESBYTERIAN CHURCH	22025217	\$48,150	
FIRST PRESBYTERIAN CHURCH Total		\$48,150	\$0
HABITAT FOR HUMANITY	22032471	\$21,455	
HABITAT FOR HUMANITY Total		\$21,455	\$0
HACIENDA COMMUNITY	22022196	\$19,666	
	22027288	\$4,000	
	22030731	\$3,840	
	22032970	\$77,530	
HACIENDA COMMUNITY Total		\$105,036	\$28,471
HOST DEVELOPMENT INC	22032968	\$7,477	
HOST DEVELOPMENT INC Total		\$7,477	\$7,477
HOUSING AUTHORITY OF PORTLAND	22005274	\$238,138	
	22037322	\$6,156	
HOUSING AUTHORITY OF PORTLAND Total		\$244,294	\$218,065
HUMAN SOLUTIONS INC	22023486	\$41,947	
HUMAN SOLUTIONS INC Total		\$41,947	\$0
IMMIGRANT AND REFUGEE COMMUNITY	22013195	\$6,783	
IMMIGRANT AND REFUGEE COMMUNITY Total		\$6,783	\$6,783

**Portland Housing Bureau - FY 2010-11 Fall BMP**  
*General Fund Encumbrance Carryover Detail Spreadsheet*

Vendor Name	PO #	GF Encumbrances Carried Forward	Fall BMP Request Amt
JOIN	22021754	\$73,124	\$0
JOIN Total		\$73,124	
JOSIAH HILL III CLINIC	A38256	\$0	
JOSIAH HILL III CLINIC Total		\$0	\$0
MULTNOMAH COUNTY	22028043	\$1,104	
MULTNOMAH COUNTY Total		\$1,104	\$0
NATIVE AMERICAN YOUTH ASSN	22030687	\$9,002	
	22039440	\$273	
NATIVE AMERICAN YOUTH ASSN Total		\$9,275	\$0
NEIGHBORHOOD PARTNERSHIP FUND	A38005	\$0	
NEIGHBORHOOD PARTNERSHIP FUND Total		\$0	\$0
NORTHWEST PILOT PROJECT I	22018296	\$1,500	
	22024175	\$14,154	
NORTHWEST PILOT PROJECT I Total		\$15,654	\$0
OREGON COMMUNITY WAREHOUSE	22022342	\$7,730	
OREGON COMMUNITY WAREHOUSE Total		\$7,730	\$0
OREGON OPPORTUNITY NETWORK	22001208	\$7,824	
OREGON OPPORTUNITY NETWORK Total		\$7,824	\$0
OUTSIDE-IN	22029306	\$5,530	
OUTSIDE-IN Total		\$5,530	\$0
PORTLAND DEVELOPMENT COMMISSION	22028075	\$102,433	
	22032638	\$196,787	
PORTLAND DEVELOPMENT COMMISSION Total		\$299,219	\$0
PORTLAND HOUSING CENTER	22032981	\$11,956	
PORTLAND HOUSING CENTER Total		\$11,956	\$0
PORTLAND PUBLIC SCHOOLS DIST 1	22007058	\$31,316	
PORTLAND PUBLIC SCHOOLS DIST 1 Total		\$31,316	\$0
PROUD GROUND	22032969	\$24,361	
PROUD GROUND Total		\$24,361	\$15,000
RAHIM INC	22045297	\$75,000	
RAHIM INC Total		\$75,000	\$45,228
SALVATION ARMY	22028221	\$83,999	
	22028222	\$206,861	
SALVATION ARMY Total		\$290,860	\$107,846
TRANSITION PROJECTS INC	22024811	\$217,841	
TRANSITION PROJECTS INC Total		\$217,841	\$0
<b>GF Encumbrances Carried Forward</b>		<b>\$1,890,895</b>	<b>\$552,507</b>

## Portland Housing Bureau Performance Measures

Program and Performance Measure	Type	FY 2009-10 Revised Budget	FY 2009-10 Year-End Actuals			
<b>Administration &amp; Support</b>						
HC_0085 - % PHB Data Users Providing Accurate & Timely Data	EFFECTIVE	75%	75%	0%	0%	0%
HC_0083 - Admin Costs As a % Of Bureau Level Budget	EFFICIENCY	6%	9%	0%	0%	0%
HC_0082 - Number of Sub-recipient Contracts Processed	WORKLOAD	135	101	0	0	0
HC_0084 - # of Users Trained And Supported In PHB Data Systems	WORKLOAD	750	707	0	0	0
HC_0086 - # of Housing Assets Monitored	WORKLOAD	302	305	0	0	0
<b>Ending Homelessness Programs</b>						
HC_0036 - Percent of Ten Year Plan PSH Production Goal Achieved	EFFECTIVE	63%	63%	0%	0%	0%
HC_0050 - Percent of exits from shelter into stable housing	EFFECTIVE	36%	58%	0%	0%	0%
HC_0054 - Percent of households exited from transitional housing into permanent housing	EFFECTIVE	45%	72%	0%	0%	0%
HC_0062 - Percent of households receiving placement assistance retaining permanent housing at 6 months	EFFECTIVE	84%	83%	0%	0%	0%
HC_0063 - Percent of households receiving placement assistance retaining permanent housing at 12 months	EFFECTIVE	76%	74%	0%	0%	0%
HC_0065 - Percent of households exited into permanent housing	EFFECTIVE	6%	92%	0%	0%	0%
HC_0066 - Average length of stay in permanent supportive housing (in days)	EFFECTIVE	524	365	0	0	0
HC_0052 - Percent of shelter exits attaining sustaining income/benefits	EFFICIENCY	32%	33%	0%	0%	0%
HC_0055 - Average length of stay in transitional housing (in days)	EFFICIENCY	423	60	0	0	0
HC_0056 - Percent of clients attaining sustaining income or benefits	EFFICIENCY	6%	18%	0%	0%	0%
HC_0035 - Number of permanent supportive housing (PSH) units funded	WORKLOAD	1,388	632	0	0	0
HC_0049 - Number of individuals served in shelter	WORKLOAD	1,522	1,935	0	0	0
HC_0053 - Number of households served in facility based transitional housing	WORKLOAD	691	1,150	0	0	0
HC_0057 - Number of households receiving eviction prevention rent assistance	WORKLOAD	868	423	0	0	0
HC_0061 - Number of households receiving placement rent assistance	WORKLOAD	447	515	0	0	0
HC_0064 - Number of households residing in permanent supportive housing units	WORKLOAD	718	865	0	0	0
<b>Home Ownership Programs</b>						
HC_0038 - Number of clients purchasing home	EFFECTIVE	405	338	0	0	0
HC_0080 - Number of households helped to purchase homes	EFFECTIVE	63	35	0	0	0
HC_0037 - Number of clients attending Homeownership classes	WORKLOAD	1,465	898	0	0	0
HC_0074 - Homeownership units built	WORKLOAD	264	284	0	0	0

**Portland Housing Bureau  
Performance Measures**

Program and Performance Measure	Type	FY 2009-10 Revised Budget	FY 2009-10 Year-End Actuals			
<b>Home Ownership Programs</b>						
HC_0076 - Number of Owner Occupied Home Repairs	WORKLOAD	129	109	0	0	0
HC_0078 - Number of First Time Homebuyers Assisted	WORKLOAD	321	338	0	0	0
<b>Rental Housing Programs</b>						
HC_0069 - Vacancy Rate of Units Built 0 to 60% MFI	EFFECTIVE	3%	3%	0%	0%	0%
HC_0033 - Amount of leveraged housing funds for every \$1 spent by PHB	EFFICIENCY	\$10.13	\$3.29	\$0.00	\$0.00	\$0.00
HC_0034 - Spending per capita	EFFICIENCY	\$62	\$76	\$0	\$0	\$0
HC_0032 - Number of affordable housing units developed	WORKLOAD	90	272	0	0	0
HC_0070 - Rental units built affordable for 0 to 60% MFI	WORKLOAD	252	256	0	0	0
HC_0072 - Rental units built affordable for 61+ to 100% MFI	WORKLOAD	84	16	0	0	0
HC_0081 - Rental Rehab Units 0 to 60% MFI	WORKLOAD	219	397	0	0	0

**Performance Measure Variance Descriptions**