



CITY OF
PORTLAND, OREGON
PORTLAND HOUSING BUREAU

Mayor Ted Wheeler
Kurt Creager, Director
421 SW 6th Avenue, Suite 500
Portland OR 97204
(503) 823-2375
Fax (503) 823-2387
portlandoregon.gov/PHB

To: City Council

From: Kurt Creager

RE: Portland Housing Bureau's Fall BMP Submittal

Date: Monday, September 11, 2017

The Portland Housing Bureau (PHB) is pleased to submit its Fall Budget Monitoring Process (BMP) report. The following represents the key highlights.

GENERAL FUND REQUESTS

PHB is requesting Council allocate one-time general fund resources for the following:

1. **General Fund Encumbrance Carryover (\$248,772):** This request would carryover funds for two encumbered FY 16-17 contracts (tenant services pilot, Cully neighborhood home repair) in order to complete the work.

OTHER BUDGET ADJUSTMENT REQUESTS

PHB's Fall BMP submission also includes a number of packages that do not request new general fund allocations. Those packages include the following. Additional detail is available in the content of PHB's BMP submission materials.

1. **Staffing Requests (\$0 various funding sources)**
This request adds a permanent Assistant Director and Capital Project Manager II in order to help the bureau manage upcoming GO Bond projects and the bureau's existing pipeline of affordable housing projects. Positions are being funded with ongoing resources from shifting existing bureau staffing costs and from bond related resources.
2. **Housing Project Rebudgets (\$5,295,004 various funding sources)**
This request adjusts budgets for affordable housing projects across fiscal years to better reflect when funds will be spent, taking advantage of better schedule information since the budget was adopted in June.
3. **Housing Program carryover (\$510,134 various funding sources)**
This request adjusts budgets for non-General Fund programs, including encumbered FY 16-17 contracts and programs that are spending in FY 17-18 instead of the prior year.
4. **Technical Adjustments (\$0 various funding sources)**
These are a number of adjustments moving funds for better tracking of costs. These changes represent no net change to the budget.

STATUS REPORTING REQUIREMENTS

The Fall BMP requires bureaus to perform several status-reporting exercises. The first explains variances between the FY 2016-17 budget and actual expenditures and revenues. The second requirement is for year-end budgetary performance measures, along with explanation of significant variances. The third is an update on the budget note included in the FY 2016-17 Adopted Budget. And the final requirement is for a status update on FY 2016-17 decision packages. Details are available in the content of PHB's BMP submission materials.

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

**CBO Discussion and Recommendations
FY 2017-18 Fall Supplemental Budget Ordinance**

Bureau: Portland Housing Bureau

Type: Program Carryover Request

Request: HC_001 - Housing Project Rebudgets

	Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
EXPENDITURES			
External Materials and Services	5,595,004	0	5,595,004
Capital Outlay	(300,000)	0	(300,000)
TOTAL EXPENDITURES	5,295,004	0	5,295,004
REVENUES			
Intergovernmental Revenues	4,362,404	0	4,362,404
Miscellaneous	932,600	0	932,600
TOTAL REVENUES	5,295,004	0	5,295,004

Bureau Description:

This request reflects a number of affordable housing project rebudgets, mostly increases carrying forward existing resources from FY 16-17, and some decreases due to changes in project timelines.

CDBG funds are carried forward due to the Hill Park projects final financial closeout happening in FY 17-18 instead of FY 16-17, and delays causing the Manor/Squire project to happen in FY 17-18.

HOME funds are carried over over to reflect the initial expenses for the Stark I & II project occurring from both City and County HOME funds. There are project rebudgets in several urban renewal areas primarily due to the following affordable housing projects:

Central Eastside - St. Francis, \$1.2 million due to the final financial close out occurring in the fall of 2017, rather than the spring.

Interstate - Both allocated and unallocated home repair funds carried forward due to not being expended in FY 16-17; homeownership funds due to long acquisition to sale timelines; carryover due to financing delay for New Meadows; reduction for the Beatrice Morrow due to faster construction leading to more funds being spent in the prior year; a significant of funding from FY 17-18 to FY 18-19 for the Argyle project due to financing delays.

Lents - Oliver Station carryover due to a slow down in construction draws because of the financing structure; 91st & Foster project carryover due to billing delays from Prosper Portland; Woody Guthrie carryover due to delays in structuring financing; carryover due primarily to both allocated home repair and downpayment assistance funds not being expended; 72nd & Foster due to delays in structuring financing.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2017-18 Fall Supplemental Budget Ordinance**

Bureau: Portland Housing Bureau

Type: Program Carryover Request

Request: HC_002 - Housing Program Carryover

	Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
EXPENDITURES			
External Materials and Services	510,134	0	510,134
TOTAL EXPENDITURES	510,134	0	510,134
REVENUES			
Budgeted Beginning Fund Balance	160,000	0	160,000
Intergovernmental Revenues	350,134	0	350,134
TOTAL REVENUES	510,134	0	510,134

Bureau Description:

This request is for the carryover of various non-General amounts, primarily grant funds, to continue programs that did not complete in FY 16-17 into FY 17-18. These carryovers include:

- CDBG funds for Fair Housing programs;
- HOPWA and ESG funds for the Joint Office of Homeless Services
- MULTE program fees that did not pass-through to Multnomah County before June 30;
- Part of the implementaion budget for the NoAPPFee project, due to delays in finalizing the contract.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2017-18 Fall Supplemental Budget Ordinance**

Bureau: Portland Housing Bureau

Type: Encumbrance Carryover Request

Request: HC_003 - GF Encumbrance Carryover

	Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
EXPENDITURES			
External Materials and Services	248,722	0	248,722
TOTAL EXPENDITURES	248,722	0	248,722
REVENUES			
General Fund Discretionary	248,722	0	248,722
TOTAL REVENUES	248,722	0	248,722

Bureau Description:

This request is for two General Fund encumbrance carryovers, reflecting funds that were contractually encumbered, but did not spend in FY 16-17.

This funding includes \$219,699 of tenent services pilot program funds for the Community Alliance of Tenants, and contract service funding (\$29,023) for NAYA in the Cully neighborhood.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2017-18 Fall Supplemental Budget Ordinance**

Bureau: Portland Housing Bureau

Type: Technical Adjustment

Request: HC_004 - Technical Adjustments

	Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
EXPENDITURES			
Personnel Services	15,000	0	15,000
External Materials and Services	(58,820)	0	(58,820)
Internal Materials and Services	43,820	0	43,820
TOTAL EXPENDITURES	0	0	0
REVENUES			
General Fund Discretionary	0	0	0
TOTAL REVENUES	0	0	0

Bureau Description:

This request reflects a number of adjustments moving funds for better tracking of costs. These changes represent no net change to the budget.

CBO Discussion and Recommendation

**CBO Discussion and Recommendations
FY 2017-18 Fall Supplemental Budget Ordinance**

Bureau: Portland Housing Bureau

Type: New Request

Request: HC_006 - Bond Implementation Staffing

	Fall BMP Requested Adjustments	Fall BMP CBO/Council Changes	Fall BMP Total Adjustments
EXPENDITURES			
Personnel Services	172,678	0	172,678
External Materials and Services	(172,678)	0	(172,678)
TOTAL EXPENDITURES	0	0	0
FTE			
Full-Time Positions	1.50	0.00	1.50
TOTAL FTE	1.50	0.00	1.50

Bureau Description:

PHB is requesting two permanent positions that will provide the additional support and capacity necessary for the bureau to address the Housing Emergency and the implementation of the Affordable Housing Bond (AHB).

One position is an Assistant Housing Director in charge of Policy and Communications. The AHB will require the development of additional bureau policies and a more robust communication strategy and implementation. The new Assistant Director will focus on the implementation of the AHB, which will free up time for the other bureau Assistant Director to focus on development and acquisition activities related to the AHB and other bureau funding sources over the next five to eight years. . The new Assistant Director will also focus on the relationship with the Joint Office of Homeless Services, providing liaison services among the entities involved in the Joint Office, as well as freeing up policy staff time for work on the AHB.

The second position is a Capital Project Manager II, which will assist in managing both the AHB projects and the the current pipeline of 2,200 units the bureau is currently funding outside of the AHB. This will free up time for existing bureau staff to focus on the overall management of the bureaus affordable housing development efforts over the next five to eight years as well as the specific assignments related to planning, underwriting, and construction coordination.

The bureau has identified ongoing funding among revenue streams new and old. The shifting of staffing onto the recently approved Lead Grant frees up urban renewal and other federal grant funding. Additional staffing shifts onto bond related funding sources freed up both General Fund and grant funding. Finaly bond related resources are available for both positions.

CBO Discussion and Recommendation

Service Area	Bureau	Package Name	Package Description	Budget Process Funded in:	Year Funded:	Added/ (Reduced) Funds	Added/ (Reduced) FTE	Package Status	Package Update
Community Development	Portland Housing Bureau	AHFE - Expanded Veterans Assistance	The package is the City's contribution of a total investment of \$575,000 that includes the contribution from Multnomah County - as proposed by AHFE Coordinating Board and accepted by AHFE Executive Committee. These funds leverage significant federal program dollars and allow us to maintain the necessary capacity to ensure that homelessness among Veterans is rare, brief and one time.	FY 2016-17 Adopted Budget	FY 2016-17	200,000		Complete	Joint Office of Homeless Services has contracted funds and services; all of funds were allocated and services were delivered.
Community Development	Portland Housing Bureau	East Portland Homeownership Assistance (New)	This package is intended to address the other factors contribute to involuntary displacement among vulnerable homeowners, such as predatory real estate and lending practices, barriers to appropriate refinancing options, mounting property taxes and utility fees, complications in estate planning. Providing funding for homeowner retention services, including legal aid, estate planning services, outreach and education around predatory real estate and lending practices, and assistance navigating existing community resources.	FY 2016-17 Adopted Budget	FY 2016-17	300,000		In Progress	PHB has contracted or is in the process of contracting funds and services are being delivered - \$144,555 in program carryover of one-time funds is requested in Spring BuMP
Community Development	Portland Housing Bureau	AHFE - Perm Housing Placement - Rapid Re-Housing	AHFE Permanent Housing Placement program. PHB funded the Permanent Supportive Housing portion of the program with \$1,662,500 in the ongoing General Fund adjusted base (making the total City contribution \$6,150,000). The total investment of \$12,300,000 for Rapid ReHousing and Permanaent Supportive Housing includes the contribution from Multnomah County - as proposed by AHFE Coordinating Board and accepted by AHFE Executive Committee.	FY 2016-17 Adopted Budget	FY 2016-17	4,487,500		Complete	Joint Office of Homeless Services has contracted funds and services; all of funds were allocated and services were delivered.
Community Development	Portland Housing Bureau	Program Design & Development Coordinator	Coordinator. The City is taking steps to adapt existing programs and develop new programs to respond to an increasing proportion of renter households in the city and the increasing demand for affordable housing units. The City is currently pursuing, or has already adopted, initiatives related to the establishment of preference policies and affirmative fair marketing, a voluntary incentive zoning program, a mandatory inclusionary zoning program, an affordable housing linkage fee program, increased renter protections, and others. These initiatives require additional staff support to develop the program detail and manage their implementation within the Bureau. Funding for the FTE position will come from existing URA and grant funds.	FY 2016-17 Adopted Budget	FY 2016-17	104,532	1.00	Complete	Position hired, is working on preference policy, policy development, and GO Bond advisory processes.
Community Development	Portland Housing Bureau	Realign HOME funding for rental assist. - plug		FY 2016-17 Adopted Budget	FY 2016-17	(947,800)		Complete	HOME funds used instead of General Funds; Joint Office of Homeless Services contracted funds and services were delivered; \$743,007 was expended, which left \$204,792 in carry-over into FY17-18.
Community Development	Portland Housing Bureau	Fair Housing Program Enhancements (New)	This package serves to address underserved populations, including \$35,000 for the Safe Housing Project to organize non-English speaking residents in substandard private-market housing to collectively request needed repairs without risking their housing. An additional \$5,000 to enable Legal Aid Services of Oregon (LASO) to direct their outreach and training to culturally specific community partners in order to increase utilization of their programs by underserved communities.	FY 2016-17 Adopted Budget	FY 2016-17	41,628		In Progress	PHB has contracted funds and services are being delivered
Community Development	Portland Housing Bureau	New Rental Rehab in East Portland	The bureau proposes to start a new program to provide grants to landlords to rehabilitate rental units that experience life/safety violations in exchange for 10-year regulated affordability. The bureau initially anticipated an average grant size of \$15,000 unit.	FY 2016-17 Adopted Budget	FY 2016-17	487,500		In Progress	Code changes for implementation pending Council approval.
Community Development	Portland Housing Bureau	Rose City Resource Guide	Funding to expand the existing Rose City resource guide.	FY 2016-17 Adopted Budget	FY 2016-17	20,000		Complete	Joint Office of Homeless Services has contracted funds and services; all of funds were allocated and services were delivered.

Community Development	Portland Housing Bureau	AHFE - Homelessness Prevention & Diversion	The package is the City's contribution of a total investment of \$2,200,000 that includes the contribution from Multnomah County - as proposed by AHFE Coordinating Board and accepted by AHFE Executive Committee. The funding will increase prevention and diversion for highly vulnerable populations, including Communities of Color, women, families with children, and individuals with significant physical and mental health disabilities. Assistance will take the form of rental assistance, professional staffing to support housing placement and retention, legal assistance/tenant advocacy, and transportation assistance.	FY 2016-17 Adopted Budget	FY 2016-17	1,100,000		Complete	Joint Office of Homeless Services has contracted funds and services; all of funds were allocated and services were delivered.
Community Development	Portland Housing Bureau	AHFE - Safety Off The Streets	The package is the City's contribution of a total investment of \$4,925,000 that includes the contribution from Multnomah County - as proposed by AHFE Coordinating Board and accepted by AHFE Executive Committee. The requested funds will allow for some start-up capital expenses, but are assumed to primarily pay for ongoing shelter operating expenses. These funds will pay for only very limited on-site support services at each shelter site. The package will continue the one-time General Fund shelter investment (\$1.2 million) from the FY 2015-16 fall BuMP, that included the Jerome Sears Shelter and Peace Shelter.	FY 2016-17 Adopted Budget	FY 2016-17	1,885,300		Complete	Joint Office of Homeless Services has contracted funds and services; all of funds were allocated and services were delivered.
Community Development	Portland Housing Bureau	East Portland Home Repair (New)	Current census data shows more than 3,000 low-income homeowners over the age of 70 live in East Portland neighborhoods that fall outside the urban renewal boundaries. Many of these elderly homeowners may be in need of help addressing emergency home repairs to keep them living safely in their homes. As neighborhood revitalization moves east from the urban core, these households are becoming increasingly susceptible to involuntary displacement.	FY 2016-17 Adopted Budget	FY 2016-17	370,338		In Progress	PHB contracted funds across two fiscal years. For FY 16-17, services were being delivered. \$144,555 of the funds were carried over to FY 17-18 in the FY 16-17 Spring BuMP. These funds have been contracted in FY 17-18.
Community Development	Portland Housing Bureau	AHFE - Lead Agency Placeholder	agency that would facilitate service delivery, manage program and policy development, and provide budget recommendations to government partners has been part of the discussion. The current proposal is for the lead agency to be located at Multnomah County as an office reporting directly to the County Chair. City funding would flow to the County via an IGA managed by the Portland Housing Bureau (PHB). This package serves as a placeholder at this time, as discussions regarding governance and flow of funds are ongoing at the time of budget submission. The package assumes no net cost to the City, though no decisions have been made regarding cost sharing.	FY 2016-17 Adopted Budget	FY 2016-17	-	(4.00)	Complete	4.0 FTE of staff successfully were transferred to Multnomah County as employees with the Joint Office of Homeless Services, to oversee AHFE and systemwide policy and planning for homeless services.
Community Development	Portland Housing Bureau	Joyce Hotel	This package provides appropriations for the purchase (using South Park Blocks URA funds) and interim operation (using short-term rental revenue) of the Joyce Hotel. Rehabilitation of the building is expected to include hazardous materials abatement, structural repairs and a seismic retrofit. During rehabilitation, current residents will be relocated. The building also needs to be brought up to current seismic standards. After rehabilitation, PHB's current plan is to continue to use the Joyce for short-term stay housing. PHB has identified a number of other buildings that need rehabilitation. However, given the tenants of those buildings, relocating them during construction would present significant challenges. PHB would use the rehabilitated Joyce to, among other things, provide a place where tenants of other buildings could be relocated. There are 69 single room occupancy units on the upper three floors.	FY 2016-17 Fall BMP	FY 2016-17	3,630,000		Complete	Joyce Hotel is now owned by PHB. Planning for rehabilitation is underway.
Community Development	Portland Housing Bureau	Construction Excise Tax	In June 2016, City Council passed a Construction Excise Tax. Because of the approval date, no appropriations were created. This request sets up appropriations in order for PHB to administer the distribution of proceeds received from the Bureau of Development Services (BDS). BDS may retain up to 4 percent of the taxes collected for payment towards the Bureau's administrative expenses related to collection and distribution of the tax. PHB and the Inclusionary Housing Fund receives 85% of net revenue from the tax imposed on residential improvements, and 100% of net revenue from the tax imposed on commercial improvements.	FY 2016-17 Fall BMP	FY 2016-17	2,688,000		In Progress	CET revenues continuing to come in. PHB and BDS monitoring progress in order to determine methodology for projecting revenue.

Community Development	Portland Housing Bureau	Business Operations Position Requests	This request covers three position actions: the conversion of a limited-term position to permanent; the addition of a Limited Term position to provide additional data collection and analysis services specifically for the Joint Office of Homeless Services; and a new position requested for the management of bureau records, specifically to address transparency issues in order to reduce the amount of staff time involved in responding to generic public and City records and information requests. The bureau prioritized internal resources to fund these needs.	FY 2016-17 Fall BMP	FY 2016-17	123,506	1.50	Complete	Position conversion completed, Limited Term position filled, Records position filled
Community Development	Portland Housing Bureau	Property Management Program Coordinator	Previously, the bureau has not held properties as assets; it has conveyed them to developers as part of affordable housing development projects. Tasks would include working with other bureaus on the transfer of properties; managing contracts related to due diligence for potential property acquisitions; developing a property management plan; and working with internal bureau staff, contractors, and property management firms to ensure proper maintenance and tracking of bureau property assets.	FY 2016-17 Fall BMP	FY 2016-17	30,642	0.50	In Progress	Temporary staff person has been hired. Bureau seeks to reclassify the position to a more appropriate type.
Community Development	Portland Housing Bureau	General Fund Encumbrance Carryover	This package requests unspent encumbered contract funding be carried forward to FY 2016-17 for the following: \$317,275 for Intensive Street Engagement (FY 2015-16 Adopted Decision Package); \$179,797 for N/NE Home Retention (FY 2015-16 Adopted Decision Package); \$142,000 for the Housing Choice Success Program (FY 2015-16 Fall BMP Decision Package); and \$45,000 for the Nexus Study & Inclusionary Housing program development (i.e., FY 2015-16 Spring BMP Decision Package).	FY 2016-17 Fall BMP	FY 2016-17	684,072		Complete	Services have been delivered.
Community Development	Portland Housing Bureau	Mount Tabor Property Acquisition	the Parks Bureau located at 60th and Stark. The transaction of \$1,200,000 is for the appraised value of the land. PHB is funding this transaction by reallocating \$700,000 budgeted for NOFA or other development opportunities in the FY 2016-17 Adopted Budget and by realizing \$500,000 of affordable housing income associated with a loan payoff. The purchase will transfer operational and managerial authority and responsibility to the PHB. When that transfer occurs, the PHB plans to deconstruct the Annex and develop an affordable housing complex on the bare land. However, there has been agreement that the YMCA will be allowed to maintain its day care center in a portion of the building that will be available for commercial enterprises.	FY 2016-17 Fall BMP	FY 2016-17	500,000		Complete	Property has transferred to PHB.
Community Development	Portland Housing Bureau	Rebudget FY 2015-16 Resources to FY 2016-17	This package requests that unspent prior year non-general fund resources be rebudgeted to FY 2016-17 for the following: \$3,716,773 for homeownership & home retention programs (TIF & Federal sources); \$2,026,817 for affordable housing development (TIF & Federal sources); and \$144,661 for lead hazard abatement (Federal Sources)	FY 2016-17 Fall BMP	FY 2016-17	5,365,577		Complete	Lead grant has been completed. Other projects have been completed.
Community Development	Portland Housing Bureau	Appropriate Miscellaneous Revenues	The appropriation of new revenues including: \$170,000 for 10 anticipated new MULTE activations; \$68,608 for Continuum of Care Planning grant; \$38,000 of IGA revenue for Servicepoint program administration; \$37,500 for NSP grant program income; and \$20,579 CDBG prior year carryover for the NAYA-Cully project.	FY 2015-16 Spring BMP	FY 2015-16	\$ 516,368		In Progress	Status is as follows: <ul style="list-style-type: none"> • The anticipated MULTE program activations did not occur. PHB now expects these will take place prior to end of calendar year 2017 and is making a request in the FY 2016-17 Fall BMP to budget these revenues. • The resources appropriated for the Continuum of Care Planning grant were spent in FY 2016-17 • The Servicepoint IGA revenues were received and will be spent on staffing and software license expenses for this program. • The NSP grant program income was received and is being spent in FY 2016-17 on an eligible acquisition-rehabilitation project • The CDBG prior year carryover was spent.

Community Development	Portland Housing Bureau	Housing Choice Voucher Success Fund	Home Forward (HF) administers approximately \$70 million annually in rental assistance from HUD under their Housing Choice Voucher (Section 8) program to subsidize the rents of low-income members of our community. The federal government pays the difference up to a HUD-established Fair Market Rent (FMR). Unfortunately, the Portland area's tight rental market is making HCVs a less viable option for the vulnerable citizens it is meant to help. This package will fund a Comprehensive Economic Study to establish more accurate and representative FMRs for use within Multnomah County, providing flexible funding for HCV holders to help with move-in and supplemental rent costs, and support three housing 'navigators' to help HCV holders successfully utilize the vouchers. Home Forward will match the City's investment for these Housing Choice Voucher Success efforts which will help reduce homelessness and families at risk of homelessness.	FY 2015-16 Fall BMP	FY 2015-16	\$ 425,000		Complete	PHB disbursed 100% of this funding to Home Forward. <ul style="list-style-type: none"> Disbursed \$25,000 for a Comprehensive Economic Study for Home Forward to establish a more accurate and representative FMRs for use within Multnomah County. AS a result, HUD raised the FMR 18% more than it would've been raised without the study. Disbursed funds to help HCV holders with cash expenses (utility connection fees; deposits and application fees). Home Forward launched the program and assisted 226 households with direct client assistance. Disbursed funds to hire three HF staff "Navigators" to provide more intensive housing search assistance than otherwise funded by HUD. Staff are assisting high barrier families locate housing and work with agencies, utilities as well as landlords to help HCV household navigate the process. The housing search funds leveraged \$1,620,000 annually in Section 8 rent assistance.
Community Development	Portland Housing Bureau	Housing State of Emergency Shelter Funding	The Mayor included \$1,515,000 in shelter related funding to address the Housing State of Emergency in his Fall FY 2015-16 proposed supplemental budget.	FY 2015-16 Fall BMP	FY 2015-16	\$ 1,265,000		Complete	PHB disbursed 104% of this funding to TPI and Ecoshuttle for shelter services. PHB intentionally over subscribed this funding by \$49,119. The State of Emergency ordinance provided additional funding to offset this.
Community Development	Portland Housing Bureau	Inclusionary Housing Development and Outreach	As a result of the passage of SB 1533 during the 2016 Legislative Session, the affordable housing nexus study scope of work has been expanded to include the necessary components of work associated with a potential mandatory inclusionary housing program. This request includes \$45,000 for the PTE contract described above, along with \$35,000 to support staffing (\$15,400 for two months in FY 2015-16 of a limited-term management analyst) and materials & services (\$20,000) for the outreach and engagement to inform program development. A limited-term management is requested for 18 months starting May 2016.	FY 2015-16 Spring BMP	FY 2015-16	\$ 65,000	0.17	Complete	Study completed. Position filled. Inclusionary Housing Program approved by Council in fall 2016, and implemented in February 2017.
Community Development	Portland Housing Bureau	Innovation Fund Award	PHB requests Council approval to budget a \$150,000 cash transfer from the general fund for an approved Innovation Fund project, Improving Access to Affordable Housing, which would replace the expiring Housing Connections tool.	FY 2015-16 Fall BMP	FY 2015-16	\$ 150,000		In Progress	The Housing Bureau is contracting with No App Fee via the innovation grant to provide an online platform on which market rate and affordable housing units can be listed. The site allows applicants to enter in information and be referred to various affordable housing waitlists or pay a single fee for a background check that will be screened against the screening criteria of the units on the site. The site will show applicants which properties they qualify for and why they do not qualify for other properties. The Housing Bureau's priority is to get a large percentage of our regulated units on the site by mandating that new units be listed, encouraging property managers to opt into using the site on a voluntary basis, and amending existing regulatory agreements as they are reopened by property managers. The site will go live October 2017.

Community Development	Portland Housing Bureau	New Appropriations	PHB requests Council approval to increase budget for the following primary reasons: <ul style="list-style-type: none"> • Pull \$800,000 of Interstate TIF set-aside allocation ahead FY 2015-16 for the New Meadows affordable housing project • Pull \$700,000 of the "Mayor's \$20M" Interstate TIF allocation ahead (from out-years of the forecast) into FY 2015-16 for home retention activities • Increase section 108 debt service budget in the CDBG fund by \$140,000, backed by program income from the Vista de Rosas and Hacienda Office Building projects • Allocate \$73,000 of new CDBG program income to the Portland Housing Center and Hacienda CDC for homeownership programs 	FY 2015-16 Fall BMP	FY 2015-16	\$ 1,727,302		In Progress	Status is as follows: <ul style="list-style-type: none"> • Of the \$800,000 for New Meadows affordable housing project, \$505,839 was rebudgeted to FY 2016-17 in the Spring BMP Project budget has been increased to \$1.3 million, funding is part of FY 17-18 Fall BuMP request . • This budget appropriation allowed the NHP program to commit funds to 27 homeowners. The majority of the funding is being rebudgeted to FY 2016-17 and FY 2017-18 when actual expenditure will occur. • These funds were expended on Section 108 debt service • The Portland Housing Center spent the funding allocated to it. Hacienda CDC did not.
Community Development	Portland Housing Bureau	Preference Policy Implementation	PHB is requesting Council approval to direct these TIF Interstate resources to support the implementation of a preference policy -- a key outcome of PHB's North-Northeast Initiative. This will fund staffing, program design, printing and distribution of m	FY 2015-16 Spring BMP	FY 2015-16	\$ 65,000		Complete	PHB implemented out the North-Northeast Preference Policy in the homeownership program area in Spring 2016. This funding supported staffing that conducted community outreach, program design and the ultimate application of the preference policy to the homeownership assistance application process. PHB expended the entirety of this funding during FY 2015-16.
Community Development	Portland Housing Bureau	Rebudget FY 2014-15 Resources to FY 2015-16	PHB requests Council approval to rebudget prior year non-general fund resources into FY 2015-16 for the following primary activities: <ul style="list-style-type: none"> • \$816,415 River District TIF for the Erickson Fritz affordable housing project • \$554,498 CDBG & TIF for Home Repair & Homebuyer Assistance commitments made prior to the end of last fiscal year • \$331,512 Gateway TIF for the Glisan Commons affordable housing project • \$224,871 CDBG for the Maggie Gibson – PCRI Restructure affordable housing project • \$102,792 NSP-3 grant program income for homeownership acquisition & rehabilitation • \$ 75,035 Innovation fund resources for the XML upload, servicepoint & faith-based provider and housing data web scraper projects 	FY 2015-16 Fall BMP	FY 2015-16	\$ 2,212,350		In Progress	Status is as follows: <ul style="list-style-type: none"> • The Erickson Fritz project is complete. • Home Repair & Homebuyer Assistance commitments carried from FY15 to FY16 were expended • The Glisan Commons project is complete • The Maggie Gibson is nearly complete (i.e., in final close-out phase) • The NSP-3 grant program income was spent on eligible homeownership acquisition & rehabilitation • Innovation fund resources for the XML upload and housing data web scraper projects were spent down in FY16. Half of the funding for the Servicepoint/Faith-based provider project was spent.
Community Development	Portland Housing Bureau	TIF Lift Outreach & Engagement	PHB is requesting Council approval to allocate TIF resources to support community outreach and engagement in Gateway & Lents. When the "TIF Lift" was approved by City Council, PHB was asked to engage the communities in these two URA's to specifically identify community priorities in how PHB will spend these new TIF resources. These funds will be used to pay for facility rental, printed materials, mailings, stipends, interpretation services, food/beverage and child care.	FY 2015-16 Spring BMP	FY 2015-16	\$ 17,375		In Progress	PHB conducted separate community engagement processes designed for the different needs of the residents of these two URA of these in Spring and Summer 2016. PHB expects to report findings and recommendations to Council in October 2016.
Community Development	Portland Housing Bureau	Affordable Housing Development / HIF	Affordable housing development via Housing Investment Fund.	FY 2015-16 Adopted Budget	FY 2015-16	\$ 2,500,000		In Progress	These funds were awarded via the Fall 2015 NOFA to the Stark I & II Project to be developed by Central City Concern in the Hazelwood neighborhood. PHB anticipates spending this resource during FY17 and FY18.
Community Development	Portland Housing Bureau	Landlord Recruitment Retention/Response	3 FTE & \$100,000 incentive funding to facilitate landlord recruitment and retention; initial tenant target populations are chronically homeless, permanent supportive housing, and veterans.	FY 2015-16 Adopted Budget	FY 2015-16	\$ 300,000		Complete	PHB disbursed 95% of this funding to JOIN. JOIN hired three full-time employees who have made substantial progress identifying new placement opportunities.

Community Development	Portland Housing Bureau	Maintain Women's Winter Shelter Year-round	<p>1. FY15-16 Requested budget for women's winter shelter total of 115 beds extended capacity provided by TPI & SA</p> <ul style="list-style-type: none"> • \$210,000 winter shelter (TPI) – 70 spaces/mats • \$62,000 winter shelter (SA) – 45 mats <p>2. Annualized FY15-16 Requested Budget for winter shelter</p> <ul style="list-style-type: none"> • [\$272,000 DIV 5 months] * 12 months = \$652,800 <p>3. HFE as requested</p> <ul style="list-style-type: none"> • Adds \$750,000 to Housing Requested Budget for winter shelter capacity year round (adds staffing, placement assistance, etc) 	FY 2015-16 Adopted Budget	FY 2015-16	\$ 750,000	Complete	PHB disbursed 100% of this funding to three providers (TPI, Urban League and Salvation Army) to carry out this program. TPI provided 28,108 bed nights to 1,047 unduplicated women. Urban League - served 125 people in 61 households 88% of assisted individuals were African American. Salvation Army provided 15,808 shelter nights (expanded mats program) to 526 unduplicated women.
Community Development	Portland Housing Bureau	Home for Everyone Coordinating Board	Support the Home for Everyone Executive Committee priorities for funding interventions to end homelessness, and a limited term initiative director position. A request for match support from Multnomah County is expected.	FY 2015-16 Adopted Budget	FY 2015-16	\$ 47,296	Complete	PHB disbursed \$42,796 to Multnomah County in support of this position. The unspent \$4,500 is the result of a transposition in the amount contracted (i.e., \$42,796 vs. \$47,296).
Community Development	Portland Housing Bureau	Preventing Displacement - Home Retention	The forums PHB held in North and Northeast Portland attracted 450 participants to talk about their housing needs. PHB learned that there is a pressing need for existing residents to have access to tools to help them stay in their homes. PHB has allocated \$4 million dollars in TIF over five years to keep people from being displaced if they live inside the Interstate URA boundary, utilizing existing home repair programs. This funding will allow PHB to target households in North and Northeast Portland whose homes are outside the Interstate Corridor URA. PHB will provide 1) zero percent interest loans of up to \$40,000 per home to provide critical home repairs for low income homeowners up to 80% of median family income; or, 2) grants of up to \$5,000 per home to provide home repairs to seniors and people with disabilities up to 50% of median family income. PHB expects to be able to reach at least 50 homeowners at a cost of \$850,000.	FY 2015-16 Adopted Budget	FY 2015-16	\$ 850,000	In Progress	PHB received \$850,000 in general fund resources to provide home repair assistance to help low-income homeowners retain their homes. 100% of this funding was committed (via sub-recipient contract or loan) in FY 2015-16. \$670,000 was expended in FY16 and PHB will request the remaining \$180,000 be carried over via the Fall 2017 Encumbrance Carryover process. When the entirety of this funding is expended, PHB will have served 71 homeowners at risk of displacement, allowing them to remain in their homes in North & Northeast Portland.
Community Development	Portland Housing Bureau	Intensive Street Engagement	In several areas throughout our community there is a disproportionate amount of homeless camping activity ("hot-spots"), and in each of these areas there are also a relatively small number of people experiencing homelessness who both a disproportionately significant impact on the public space they occupy and are particularly difficult to serve.	FY 2015-16 Adopted Budget	FY 2015-16	\$ 1,024,989	Complete	PHB disbursed 100% of this funding to Cascadia and Central City Concern. Cascadia placed 49 households into permanent housing. Central City Concern Clean and Safe program removed 8,129 bags of trash.
Community Development	Portland Housing Bureau	Veterans' Rental Assistance	This request will address needs of Veterans that are not eligible for VA-services (i.e., unable to access federal Veteran Affairs Supportive Housing vouchers). PHB anticipates placement of 173 veterans in FY 2016.	FY 2015-16 Adopted Budget	FY 2015-16	\$ 500,000	Complete	PHB disbursed 100% of this funding to three separate providers -- Do Good Multnomah, Cascadia & Transition Projects (TPI) -- to carry out this program. Do Good Multnomah provided 3,025 bed nights of shelter to 98 unduplicated Veterans. Cascadia secured the site through a master lease so that renovations and improvements could be completed to begin moving tenants in early FY 16-17. The property was cleared for occupancy in late July. TPI assisted 73 Veteran households in moving to permanent housing. Of the 73 Veterans placed, 36 were able to use a Housing Choice Voucher.

Community Development	Portland Housing Bureau	FY 2015-16 State of Emergency Ordinance	Housing State of Emergency Ordinance # 187629 Funding allocated for: Tenant Protection Team	FY 2015-16 State of Emergency Ordinance	FY 2015-16	\$ 50,000		Complete	PHB disbursed 100% of this funding in FY 2015-16. Funds were contracted with the nonprofit partner Asian Pacific American Network of Oregon (APANO) to provide tenant protections to 27 households (40 people) in the Douglas Square Apartments community, located in the Jade District of East Portland. More than 70% of the households served were families of color, with nearly half (48%) being from the Cantonese community. Funds supported households in gaining legal representation to enter into good faith settlement negotiations with the management company of Douglas Square, to freeze rent increases until Summer 2017, thereby preventing the immediate eviction of an expected 27 or more low and very low income households
Community Development	Portland Housing Bureau	FY 2015-16 State of Emergency Ordinance	Housing State of Emergency Ordinance # 187629 Funding allocated for: Ticket Home	FY 2015-16 State of Emergency Ordinance	FY 2015-16	\$ 30,000		Complete	PHB disbursed 100% of this funding in FY 2015-16. 52 clients in 40 households were assisted with transportation costs to return home. There were 6 airplane tickets, 42 bus tickets, and 5 train tickets.
Community Development	Portland Housing Bureau	FY 2015-16 State of Emergency Ordinance	Housing State of Emergency Ordinance # 187629 Funding allocated for: STRA Housing Placement and Eviction Prevention	FY 2015-16 State of Emergency Ordinance	FY 2015-16	\$ 1,035,000		Complete	PHB disbursed 91% of this funding in FY 2015-16 as follows: <ul style="list-style-type: none"> • Human Solutions (\$27,500): placed six families into permanent housing. • JOIN (\$462,500): placed 29 households into permanent housing and prevented 25 evictions. • NWPP (\$115,000): Placed 87 households into permanent housing and prevented 95 evictions • Home Forward (\$75,000): 205 households either placed or prevented from eviction • CCC (\$199,000): 58 households either placed in housing or prevented from eviction • SAFES (\$16,000): 14 women placed into housing • TPI (\$140,000): 60 housing placements
Community Development	Portland Housing Bureau	FY 2015-16 State of Emergency Ordinance	Housing State of Emergency Ordinance # 187629 Funding allocated for: Mobile Provider Team Pilot	FY 2015-16 State of Emergency Ordinance	FY 2015-16	\$ 50,000		Complete	PHB disbursed 83% of this funding in FY 2015-16. Subrecipient JOIN hired a team lead and engaged three partners, NARA, YWCA, and Urban League to add capacity to the team. In-reach sites are identified, including Dignity Village and Right to Dream Too.
Community Development	Portland Housing Bureau	FY 2015-16 State of Emergency Ordinance	Housing State of Emergency Ordinance # 187629 Funding allocated for: Shelter Assistance	FY 2015-16 State of Emergency Ordinance	FY 2015-16	\$ 840,526		Complete	PHB disbursed 17% of this funding in FY 2015-16. for renovations at the Human Solutions family shelter, as June expenses at Sears shelter (shuttle), as well as start-up costs at the Peace Annex and Hansen shelters.
Community Development	Portland Housing Bureau	Terminal One	The package requests unspent State of Emergency Ordinance funding be carried forward to cover the lease and unanticipated costs of the Terminal One property. (Note: PHB reduced appropriation in FY 2015-16 for this express purpose via Overexpenditure Ordinance package HC_022.) It is envisioned that the property will be used as a temporary homeless shelter for an 18 month period through a series of 3 six-month leases. The plan is for a non-profit to provide funding for tenant improvement and shelter operation costs.	FY 2016-17 Fall BMP	FY 2016-17	414,546		Complete	Terminal 1 plan did not come to fruition. Funds were shifted to other priority homeless services, administered and contracted by the Joint Office of Homeless Services for activities including provision of winter and expanded emergency shelter and rent assistance.

Community Development	Portland Housing Bureau	Homeownership Program Coordinator	This position request is to address additional workload issues in the Homeowner Access and Retention Team. The MULTE program and staffing resource has been shifted to another team and the new programs and activities have emerged in the scope of this team, including a new Mortgage Assistance Program; Expanded Mortgage Credit Certificate Program; New Potential ADU pilot program; Rental Rehab Program Coordination; and Coordination of a homeownership development RFP	FY 2016-17 Fall BMP	FY 2016-17	45,732	0.50	In Progress	Recruitment in process.
Community Development	Portland Housing Bureau	Miscellaneous New Appropriations	This request includes \$2,640,000 in program income to facilitate homeownership acquisition & rehabilitation in the Interstate Corridor URA; \$2,500,000 in funds from Multnomah County (part of \$5 million total) awarded in the 2015 NOFA in anticipation of use on several housing projects; \$98,000 for several MULTE activations that were approved by the City Council late in the previous fiscal year; \$33,327 to rebudget unspent prior year Innovation funding for the faith-based provider project; \$26,462 in various grant budget adjustments; and \$17,000 for Council mandated TIF Lift outreach in the Gateway and Interstate Urban Renewal Areas in anticipation of the potential approval of a Portland program. This is requesting staffing and appropriation authority for the implementation of the program in early 2017. Included are one permanent and one limited term position, equipment, and space rental from the Bureau of Development Services. Funding would come from potential in-lieu fee payments, which would also be used to provide potential financial incentives for developers to deepen unit affordability.	FY 2016-17 Fall BMP	FY 2016-17	5,319,985		In Progress	IGA for Multnomah County funds being finalized, will carryover to FY 17-18, Instate homeownership funds being expending, MULTE activations occurring, TIF Lift outreach has occurred and been reported to Council, Innovation funding being reimagined and carried over to FY 17-18.
Community Development	Portland Housing Bureau	Inclusionary Housing Implementation	requesting staffing and appropriation authority for the implementation of the program in early 2017. Included are one permanent and one limited term position, equipment, and space rental from the Bureau of Development Services. Funding would come from potential in-lieu fee payments, which would also be used to provide potential financial incentives for developers to deepen unit affordability.	FY 2016-17 Fall BMP	FY 2016-17	531,281	1.17	Complete	Staff hired and program in operation.
Community Development	Portland Housing Bureau	General Fund Non-Encumbrance Carryover	reallocated to fund continued services for the following: \$100,000 unspent Mayor's office appropriation for Springwater Corridor clean-up, outreach and relocation expenses (e.g., personal care and clean-up supplies; property storage expenses; transportation assistance; application and identification fees; motel vouchers; costs of increasing outreach and service coordination staff time on the corridor throughout at least the month of September); \$96,687 unspent Housing State of Emergency (Housing Placement and Eviction Prevention) funds for permanent housing placement (38 households); \$41,383 unspent Housing State of Emergency (Mobile Provider Pilot) for permanent housing placement (16 households); and \$16,333 unspent FY 2015-16 Adopted Budget decision package (Landlord Recruitment) funds for eviction prevention & placement assistance (6 households).	FY 2016-17 Fall BMP	FY 2016-17	254,403		Complete	Joint Office of Homeless Services has contracted funds and services; all of funds were allocated and services were delivered.
Community Development	Portland Housing Bureau	Program Carryover: St Vincent Depaul	This package requests the carryforward of funding de-appropriated in the FY 2015-16 Overexpenditure Ordinance in HC_022: \$227,025 unspent Housing State of Emergency (Shelter Assistance) funds for St Vincent Depaul shelter renovation expenses. The actual amount de-appropriated for this purpose was \$250,000; OMF-facilities has requested \$22,975 from this total for repayment related to expenses they incurred during initial purchasing of the St. Vincent DePaul property.	FY 2016-17 Fall BMP	FY 2016-17	227,025		Complete	Joint Office of Homeless Services has contracted funds and services; all of funds were allocated and services were delivered.

Community Development	Portland Housing Bureau	Add Contract Coordinator	This request would add a contract coordinator position in Business Operations. With new lines of business, the bureau is utilizing more Goods and Services and PTE contracts, thus interacting more with Procurement Services. This position would coordinate and interface with Procurement Services, as well as assist bureau staff with contract development and management. The bureau still has some sub-recipient contracts, and this position would take over some of the duties of program coordinators, freeing up their time for program evaluation and funding partner relations. The new position would also take on the current procurement activities performed in the Finance and Accounting team, providing some additional capacity to address the demands of the financial transactions related to the ownership of apartment buildings. Funding for this position is part of the bureau's FY 17-18 Request budget, but the need is immediate and the bureau is able to fund the position for the remainder of FY 16-17 from vacancy savings.	FY 2016-17 Spring BMP	FY 2016-17	-	0.15	Complete	Position filled.
Community Development	Portland Housing Bureau	Business Operations Position Requests	<ul style="list-style-type: none"> - The conversion of a limited-term position to permanent. This position works on the bureau's data analysis team and was previously funded primarily by a grant. The bureau was able to shift the position's funding to non-grant and entitlement grant sources in the FY 2016-17 budget, but held off on making the conversion to permanent status until further analyzing staffing needs on this team. - The addition of a Limited Term position to provide additional data collection and analysis services specifically for the Joint Office of Homeless Services. This position is funded by Multnomah County. - A new position requested for the management of bureau records, specifically to address transparency issues in order to reduce the amount of staff time involved in responding to generic public and City records and information requests. This position would manage which documents can be made available through the City's e-files system and on the bureau website, and which files may have proprietary and personally identifiable information and need to be kept secure. The position would also manage the organization of housing project files for more coordinated access and retrieval, and restart the bureau archiving program. 	FY 2016-17 Spring BMP	FY 2016-17	-	-	Complete	Positions filled.
Community Development	Portland Housing Bureau	Program Rebudgets	This request is intended to carryover Innovation Fund projects to FY 17-18. The NoAppFee project is contracted and expected to spend out through the spring and summer. The homeless data collection project is moving to another phase, and the plan for spending the remaining funds (\$33,327) is underway.	FY 2016-17 Spring BMP	FY 2016-17	110,428		In Progress	Contract with NoAppFee completed. Project implementation begins in September 2017.
Community Development	Portland Housing Bureau	Oak Leaf Acquisition	This request is to appropriate \$1.3 million of General Fund Community Development Block Grant funds for the acquisition of the Oak Leaf mobile home property in the Cully neighborhood. Discussions with stakeholders and partners extended into October before a financing strategy was settled upon. Approximately \$1.3 million of the request will cover the take out of a temporary bridge loan floated by PHB that needs to be resolved by June 30. The remaining portion of the request reflects the current commitment of funds to the Oak Lawn rehabilitation effort, the scope of which is still under development.	FY 2016-17 Spring BMP	FY 2016-17	1,500,000		In Progress	Acquisition transaction completed. Underwriting for rehabilitation portion in progress. FY 2017-18 budget includes funding for rehabilitation.
Community Development	Portland Housing Bureau	General Fund Program Carryover	This request is to move one-time General Fund resources for homeowner retention services in East Portland to FY 17-18 (\$144,555 of the original \$300,000). Since this programming is in a new geographic area for these services, PHB reached out to identify new partners, and have been working with the new provider (Latino Network) to confirm project scope and outcomes, build capacity, and align their work with other providers of similar services. Most of the carryover funds relate to this contract.	FY 2016-17 Spring BMP	FY 2016-17	(144,555)		In Progress	Contracts for this funding completed. Contract provider beginning to execute work program.

Community Development	Portland Housing Bureau	Ellington Interfund Loan Repayment	purchase of the Ellington Apartments to flow through the bureau's new Housing Capital Fund. This realignment reflects the new business practice of bureau capital acquisitions and any construction work occurring in the new capital fund. Second, it appropriates the first issuance of bond proceeds from the Housing General Obligation Bond. The approximately \$37.1 million Series A bonds will be used to repay a significant portion of the interfund loan from the Bureau of Development Services used to acquire the Ellington Apartments.	FY 2016-17 Spring BMP	FY 2016-17	33,437,699		Complete	First portion of BDS loan repaid with interest.
Community Development	Portland Housing Bureau	Rental Rehab Program Carryover	Carryover of \$487,500 in rental rehab program funding into FY 2017-18. Added as an amendment during budget adoption.	FY 2016-17 Spring BMP	FY 2016-17	(487,500)		In Progress	Program guidelines have been completed. Bureau working with potential borrowers.

Portland Housing Bureau

Performance Measures

Performance Measure	Type	FY 2014-15 Year-End Actuals	FY 2015-16 Year-End Actuals	FY 2016-17 Adopted Budget	FY 2016-17 Year-End Actuals	FY 2017-18 Adopted Budget
HC_0037 - Number of households receiving homebuyer education or counseling	WORKLOAD	996	1,594	2,100	975	2,100
HC_0039 - Total number of workforce participants	WORKLOAD	1,212	1,029	1,200	1,178	1,100
HC_0045 - Total number of Microenterprise participants	WORKLOAD	353	300	350	262	300
HC_0069 - Vacancy rate of units built 0% to 60% median family income	EFFECTIVE	3%	3%	3%	3%	3%
HC_0070 - Housing units opened that are newly affordable	KPM	182	362	753	650	650
HC_0083 - Administrative costs as a percentage of bureau level budget	EFFICIENCY	10%	11%	5%	12%	4%
HC_0105 - Total number of homeless individuals placed in permanent housing	KPM	3,909	4,049	4,324	4,889	4,374
HC_0106 - Retention rate of households placed in permanent housing at 12 months	KPM	78%	74%	85%	74%	85%
HC_0107 - Number of individuals prevented from becoming homeless	KPM	3,522	3,922	4,900	6,576	5,020
HC_0108 - Average length of time (days) spent in homeless shelter (all populations)	EFFECTIVE	23	25	35	28	35
HC_0109 - Number of individuals who have been homeless for a year or less	EFFECTIVE	779	779	779	564	779
HC_0110 - Percentage of households moved from homelessness into housing that subsequently return to homelessness	KPM	3%	6%	5%	8%	5%
HC_0111 - Percentage of households receiving homebuyer education or counseling and subsequently purchasing a home	KPM	28%	10%	28%	15%	10%
HC_0112 - Number of households receiving home repairs	WORKLOAD	516	635	850	586	650
HC_0113 - Percentage of households receiving home repairs and retaining their homes 12 months after services	KPM	83%	80%	80%	88%	80%
HC_0114 - Number of households receiving indirect assistance through foregone revenue (mortgage credit certificate, limited tax exemption, and system development charge exemption)	EFFECTIVE	335	196	335	142	200
HC_0115 - Affordable housing units preserved	EFFECTIVE	156	58	150	263	150
HC_0116 - Rolling three-year average of total units opened and preserved	EFFECTIVE	382	461	499	499	650
HC_0117 - Average investment per rental housing unit	EFFICIENCY	\$51,000	\$75,700	\$75,000	\$75,000	\$100,000
HC_0118 - Percentage of housing units opened or preserved in high opportunity areas	EFFECTIVE	55%	50%	50%	55%	75%
HC_0119 - Administrative costs as a rolling three-year average	EFFICIENCY	11%	12%	8%	11%	5%
HC_0120 - Percentage utilization of minority, women, and emerging small business contracts in housing construction (contract \$ awarded)	EFFECTIVE	30%	31%	20%	20%	20%

Portland Housing Bureau

Performance Measures

Performance Measure	Type	FY 2014-15 Year-End Actuals	FY 2015-16 Year-End Actuals	FY 2016-17 Adopted Budget	FY 2016-17 Year-End Actuals	FY 2017-18 Adopted Budget
HC_0121 - Percentage utilization of minority contracts in housing construction (contract \$ awarded)	KPM	13%	19%	15%	15%	15%
HC_0122 - Percentage of workforce participants employed at graduation	EFFECTIVE	73%	79%	70%	65%	80%
HC_0123 - Percentage of microenterprises increasing economic stability at program exit	EFFECTIVE	57%	79%	55%	85%	80%
HC_0124 - Number of renter clients who were provided information and referrals	WORKLOAD	0	0	0	350	657
HC_0125 - Number of successful referrals to PHB regulated housing units with NoAppFee application	EFFECTIVE	0	0	0	0	800

Performance Measure Variance Descriptions

Line 0	Item	PO Date	Vendor No.	Vendor Name	Contract No.	Cost Object No.	Cost Object Name	Fund No.	Bus Area	Funds Centers No.	Commitment Item No.	Pur Grp	Buyer	FY 2018 Begin Encumbrances	Date of Last Transaction	Last GR Date Record	FY 2018 GR/IR Transactions	Remaining Encumbrance	x	Fall BMP Encumbrance Carryover Request
22199944	40	10/11/16	100619	Native American Youth And	32001382	H89010.GF.17.320	Naya Cully - Amd No. 1 Gf	100000	HC00	HCPG000005	529001	X99	ASHOOK	125,039.85	07/01/17	06/19/17	0.00	125,039.85		\$ 29,073
22200199	50	10/14/16	105376	Community Alliance Of Tenants	32001389	HCMG000002	Business Operations	100000	HC00	HCMG000002	529001	X99	ASHOOK	258,537.34	07/01/17	06/14/17	0.00	258,537.34		\$ 219,699

Budget Note Update

Portland Housing Bureau

Date of Update: July 1, 2016 in PRIOR FY 2016-17 Adopted Budget

Budget Note Title: Housing Emergency Outreach and Engagement

Budget Note Language: Council directs the Office of Neighborhood Involvement to work with the Portland Housing Bureau, the City and County Joint Office for Homeless Services, and A Home for Everyone to develop materials and messaging for community engagement on housing prior to spending the \$350,000 allocated in its budget for this purpose. The Office of Neighborhood Involvement will return to Council for approval of the outreach plan before funds are expended.

Summary Status: Underway

Budget Note Update: September 11, 2017

Office of Neighborhood Involvement has advertised for two positions.

Prior Year Fund Reconciliation Report

	FY 2016-17 Revised Budget	FY 2016-17 Year-End Actuals	Percent of Actuals to Revised
213 - Housing Investment Fund			
EXPENDITURES			
Personnel Services	1,105,210	984,488	89.08
External Materials and Services	3,058,672	2,315,455	75.70
Internal Materials and Services	450	31,000	6,888.89
Bond Expenses	0	0	0.00
Fund Transfers - Expense	1,946,353	1,946,353	100.00
Contingency	2,142,345	0	0.00
TOTAL EXPENDITURES	8,253,030	5,277,296	63.94
REVENUES			
Budgeted Beginning Fund Balance	493,585	0	0.00
Charges for Services	618,351	568,189	91.89
Intergovernmental Revenues	2,817,500	5,365,588	190.44
Fund Transfers - Revenue	1,200,000	1,200,000	100.00
Miscellaneous	3,123,594	2,293,973	73.44
TOTAL REVENUES	8,253,030	9,427,750	114.23

Fund Reconciliation Narrative

Expenditures

Personnel Services - Underexpenditure due to vacant positions in Business Operations.

External Materials & Services - Underexpenditure primarily due to the Stark I & II affordable housing project closing in early FY 17-18 rather than late FY 16-17.

Internal Materials & Services - Overexpended due to costs not being shifted to another fund at year-end.

Revenues

Charges for Services - Undercollected due to timing of MULTE tax abatement applications

Intergovernmental Revenues - Overcollected due the transfer of Multnomah County affordable housing funds occurring all at once rather than per project.

Miscellaneous - Undercollected primarily due to the pre-development loan for the Stark I & II affordable housing project repaying in early FY 17-18 rather than late FY 16-17.

Prior Year Business Area Reconciliation Report

	FY 2016-17 Revised Budget	FY 2016-17 Year-End Actuals	Percent of Actuals to Revised
Portland Housing Bureau			
EXPENDITURES			
Personnel Services	\$7,103,873	\$6,386,594	90%
External Materials and Services	\$88,598,887	\$67,514,054	76%
Internal Materials and Services	\$1,565,977	\$1,606,479	103%
Capital Outlay	\$68,452,978	\$68,159,706	100%
Bond Expenses	\$39,163,869	\$39,011,753	100%
Fund Transfers - Expense	\$3,667,577	\$3,661,322	100%
Contingency	\$4,137,448	\$0	0%
TOTAL EXPENDITURES	\$212,690,609	\$186,339,908	88%
REVENUES			
Budgeted Beginning Fund Balance	\$1,737,858	\$0	0%
Taxes	\$2,688,000	\$1,824,101	68%
Charges for Services	\$4,910,610	\$3,590,658	73%
Intergovernmental Revenues	\$79,786,084	\$65,613,859	82%
Interagency Revenue	\$104,964	\$98,270	94%
Fund Transfers - Revenue	\$3,262,492	\$3,256,237	100%
Bond and Note	\$84,619,862	\$84,701,266	100%
Miscellaneous	\$9,029,357	\$8,060,901	89%
General Fund Discretionary	\$26,551,382	\$0	0%
TOTAL REVENUES	\$212,690,609	\$167,145,291	79%

Bureau Reconciliation Narrative

General Fund

Expenditures

Internal Materials & Services - Underexpenditure due to more indirect costs being charged to eligible funding sources than originally modeled.

Federal Grants Fund

Expenditures

Underexpenditures are due primarily to the 2013 Lead Grant expiring prior to all available funds being expended.

Revenues

Since the Lead Grant is a reimbursement grant, undercollections occurred for the same reason as noted above for expenditures.

Prior Year Fund Reconciliation Report

	FY 2016-17 Revised Budget	FY 2016-17 Year-End Actuals	Percent of Actuals to Revised
218 - Community Development Block Grant Fund			
EXPENDITURES			
Personnel Services	1,411,271	1,342,041	95.09
External Materials and Services	10,851,275	6,296,598	58.03
Internal Materials and Services	342,615	333,607	97.37
Bond Expenses	877,000	726,268	82.81
TOTAL EXPENDITURES	13,482,161	8,698,514	64.52
REVENUES			
Budgeted Beginning Fund Balance	150,000	0	0.00
Charges for Services	0	8,371	0.00
Intergovernmental Revenues	12,182,161	7,006,630	57.52
Miscellaneous	1,150,000	1,431,823	124.51
TOTAL REVENUES	13,482,161	8,446,823	62.65

Fund Reconciliation Narrative

Expenditures

External Materials & Services - Underexpenditure primarily due to the Hill Park projects final financial closeout happening in FY 17-18 instead of FY 16-17, a credit due to savings on the Bronaugh project, and committed home repair funds that will expend in FY 17-18 instead of FY 16-17.

Bond Expenses - Underexpenditure is due to an interfund loan that was not required.

Intergovernmental Revenues - Since CDBG is a reimbursement grant, undercollections occurred for the same reasons as the underexpenditures described above.

Miscellaneous - Overcollection due to unanticipated loan payoffs.

Prior Year Fund Reconciliation Report

	FY 2016-17 Revised Budget	FY 2016-17 Year-End Actuals	Percent of Actuals to Revised
219 - HOME Grant Fund			
EXPENDITURES			
Personnel Services	359,021	313,259	87.25
External Materials and Services	4,351,157	4,050,231	93.08
Bond Expenses	75,000	0	0.00
TOTAL EXPENDITURES	4,785,178	4,363,490	91.19
REVENUES			
Budgeted Beginning Fund Balance	75,000	0	0.00
Charges for Services	0	1,098	0.00
Intergovernmental Revenues	4,310,178	3,917,464	90.89
Miscellaneous	400,000	409,566	102.39
TOTAL REVENUES	4,785,178	4,328,128	90.45

Fund Reconciliation Narrative

Expenditures

Personnel Services - Underexpended due to vacant positions in Business Operations.
 Bond Expenses - Underexpended due to an interfund transfer that was not required.

Revenues

Beginning Balance - Undercollected due to the above mentioned interfund transfer not occurring.

Prior Year Fund Reconciliation Report

	FY 2016-17 Revised Budget	FY 2016-17 Year-End Actuals	Percent of Actuals to Revised
221 - Tax Increment Financing Reimbursement Fund			
EXPENDITURES			
Personnel Services	3,050,701	2,695,128	88.34
External Materials and Services	37,583,611	25,723,844	68.44
Internal Materials and Services	1,101,705	1,145,305	103.96
Capital Outlay	20,928,156	20,745,411	99.13
Fund Transfers - Expense	463,251	463,251	100.00
Contingency	75,000	0	0.00
TOTAL EXPENDITURES	63,202,424	50,772,939	80.33
REVENUES			
Budgeted Beginning Fund Balance	1,019,273	0	0.00
Charges for Services	789,256	924,548	117.14
Intergovernmental Revenues	56,860,632	46,115,841	81.10
Fund Transfers - Revenue	190,000	190,000	100.00
Miscellaneous	4,343,263	3,831,117	88.21
TOTAL REVENUES	63,202,424	51,061,507	80.79

Fund Reconciliation Narrative

Expenditures

Personnel Services - Underexpended due to vacancies and greater CDBG related project activity early in the fiscal year.

External Materials & Services - Underexpended in several urban renewal areas primarily due to the following affordable housing projects:

Central Eastside - St. Francis, \$1.3 million due to the final financial close out occurring in the fall of 2017, rather than the spring.

Interstate - \$1.2 million due to both allocated and unallocated home repair funds not being expended; \$932,000 in homeownership funds due to long acquisition to sale timelines; \$500,000 due to financing delay for New Meadows; \$500,000 due to a delay in finalizing the predevelopment loan for the N Williams project; \$330,000 for King/Parks due to the predevelopment loan expending slower than anticipated; \$260,000 for the Argyle project due to the predevelopment loan expending slower than anticipated.

Lents - \$1.6 million for Oliver Station due to a slow down in construction draws because of the financing structure; \$1.2 million for the 91st & Foster project due to billing delays from Prosper Portland; \$700,000 for the Woody Guthrie due to delays in structuring financing; \$460,000 due primarily to both allocated home repair and downpayment assistance funds not being expended; 72nd & Foster due to delays in structuring financing.

Convention Center - \$900,000 budgeted early for a 2017 NOFA project that will not expend until well into 2018.

River - \$600,000 for 14th and Raleigh due to slower than anticipated initial construction draws.

North Macadam - \$473,000 for Riverplace due to delays in structuring financing.

Revenues

Charges for Services - Overcollected due to higher than anticipated rent collection at urban renewal owned apartment buildings.

Intergovernmental Revenues - Undercollected due to underexpenditures noted above; this funding source is tax increment funds reimbursed by Prosper Portland.

Miscellaneous - Undercollected due to anticipated predevelopment loans not getting repaid in FY 16-17 due projects rolling into FY 17-18.

Prior Year Fund Reconciliation Report

	FY 2016-17 Revised Budget	FY 2016-17 Year-End Actuals	Percent of Actuals to Revised
225 - Inclusionary Housing Fund			
EXPENDITURES			
Personnel Services	166,026	150,817	90.84
External Materials and Services	1,569,100	20,796	1.33
Internal Materials and Services	9,466	7,704	81.39
Contingency	1,543,408	0	0.00
TOTAL EXPENDITURES	3,288,000	179,317	5.45
REVENUES			
Taxes	2,688,000	1,824,101	67.86
Charges for Services	401,008	0	0.00
Fund Transfers - Revenue	198,992	198,992	100.00
Miscellaneous	0	4,200	0.00
TOTAL REVENUES	3,288,000	2,027,293	61.66

Fund Reconciliation Narrative

Expenditures

External Materials & Services - Underexpended due to CET revenue not being collected until late in the fiscal year.
 Internal Materials & Services - Underexpended due to lower than anticipated location costs for Inclusionary Housing staff.

Revenues

Taxes - CET collections did not ramp up until later in the fiscal year due to the time between project intake and permit issuance being longer than originally forecast.
 Charges for Services - Collection did not occur because the original fee structure envisioned for Inclusionary Housing was not implemented in the final legislation.

Prior Year Fund Reconciliation Report

	FY 2016-17 Revised Budget	FY 2016-17 Year-End Actuals	Percent of Actuals to Revised
226 - Housing Property Fund			
EXPENDITURES			
Personnel Services	31,292	7,308	23.35
External Materials and Services	1,734,189	823,358	47.48
Internal Materials and Services	30,550	30,541	99.97
Capital Outlay	110,527	0	0.00
Bond Expenses	760,769	832,769	109.46
Fund Transfers - Expense	1,257,973	1,251,718	99.50
Contingency	376,695	0	0.00
TOTAL EXPENDITURES	4,301,995	2,945,693	68.47
REVENUES			
Charges for Services	3,101,995	2,081,397	67.10
Intergovernmental Revenues	0	305,391	0.00
Fund Transfers - Revenue	1,200,000	1,200,000	100.00
Miscellaneous	0	24,007	0.00
TOTAL REVENUES	4,301,995	3,610,795	83.93

Fund Reconciliation Narrative

Expenditures

Personnel Services - Underexpenditure is due to less post-acquisition staffing costs on the Ellington Apartments than anticipated.
 External Materials and Services - Underexpenditure is due primarily to the budget for the Ellington Apartments reflecting 12 months of operation instead of the actual four months of operation.

Revenues

Charges for Services - Undercollected due primarily to the budget for the Ellington Apartments reflecting 12 months of operation instead of the actual four months of operation.
 Intergovernmental Revenues - Overcollected due to an unanticipated transfer of funds from Prosper Portland for the Headwaters Apartments reserve.
 Miscellaneous - Overcollected due to higher than anticipated interest earnings on building reserves.

Prior Year Fund Reconciliation Report

	FY 2016-17 Revised Budget	FY 2016-17 Year-End Actuals	Percent of Actuals to Revised
404 - Housing Capital Fund			
EXPENDITURES			
Personnel Services	49,800	50,072	100.55
External Materials and Services	160,667	84,825	52.80
Internal Materials and Services	30,000	54,311	181.04
Capital Outlay	47,414,295	47,414,295	100.00
Bond Expenses	37,451,100	37,452,716	100.00
TOTAL EXPENDITURES	85,105,862	85,056,218	99.94
REVENUES			
Fund Transfers - Revenue	473,500	467,245	98.68
Bond and Note	84,619,862	84,701,266	100.10
Miscellaneous	12,500	58,423	467.38
TOTAL REVENUES	85,105,862	85,226,933	100.14

Fund Reconciliation Narrative

Expenditures

Internal Material & Services - Overexpended primarily due to an interagency billing that was not communicated to the bureau.

Revenues

Miscellaneous - Overcollected due to higher than anticipated interest earnings.