



Portland Housing Bureau

Mayor Ted Wheeler • Director Shannon Callahan

421 SW 6th Avenue, Suite 500
Portland, OR 97204
503-823-2375 PHONE
503-823-2387 FAX
portlandoregon.gov/phb

To: City Council

From: Shannon Callahan

RE: Portland Housing Bureau's Fall BMP Submittal

Date: Wednesday, September 9, 2020

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

FINANCIAL UPDATE

PHB has a mix of funding that is primarily federal and bond sources that are minimally affecting PHB's programs in FY20/21.

Current economic conditions are leading to a significant drop in Construction Excise Tax (CET) income. This reduction is not expected to impact PHB until FY 2023-24, at approximately the same time as Tax Increment Finance (TIF) Revenues are expected to decline. These two reductions in revenue, TIF & CET, are expected to significantly decrease PHB's affordable housing production. Revenue estimates have been adjusted in the BMP submission, but there was no net budget impact for FY 2020-21.

In addition, the current economic downturn is affecting PHB's dedicated Short-term Rental Taxes and Fees. Due to the current economic crisis, short term taxes and fee revenue are severely declining. However, revenue from short-term rentals has not been planned for programming by PHB until approximately FY 2023-24. The short-term rental tax income is used primarily for the Portland Housing Bond program cash flow prior to housing development projects close. The projected reduction in this tax may limit programming options beginning in FY 2023-24. No further adjustments have been made in the fall BMP submittal.

GENERAL FUND REQUESTS

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

Rental Services Office Rental Registration Fee Reserve (\$515,890)

Based on the financial uncertainty of projections for the first-year collection of the newly established Rental Registration Fee, PHB requested and Council approved a one-time reserve of funds from PHB's East Portland program and from funds for internal bureau operations to ensure continuity of the Rental Services Offices programming and staffing. These funds have been held in contingency since the adoption of the FY 2020-21 Budget. Due however to Rental Registration Fee revenue collections coming in as previously anticipated, PHB is now requesting those funds in reserve be rededicated to the East Portland program, specifically for rent support for East Portlanders who have been heavily impacted by the current rent crisis. This request is to return those funds held in contingency for additional rent relief in East Portland (\$500,000) and to address equipment and software needs for the PHB due to remote working (\$15,890).

GENERAL FUND REDUCTIONS

PHB is making the specified reductions for the fall BuMP totaling \$49,000. The bureau set these amounts aside in the FY 2020-21 Adopted Budget to mitigate service impacts.

OTHER BUDGET ADJUSTMENT REQUESTS

PHB's Fall BMP submission also includes 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. Housing Project Re-budgets (\$3.3 million various funding sources)

This request adjusts budgets for affordable housing projects (multi-family and single family) across fiscal years to better reflect when funds will be spent, taking advantage of better schedule information since the budget was adopted in June.

2. Property and Bond Fund Adjustments (\$3 million various funding sources)

This request adjusts budgets for holding and operating costs for various PHB properties being held for development and adjusts interfund loans to PDX Bond and Metro grants funds.

3. Technical Adjustments (\$0 various funding sources)

These are several 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 2019-20 budget and actual expenditures and revenues. The second requirement is for year-end budgetary performance measures, along with explanation of significant variances. 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.



Housing Director, Shannon Callahan

HC - Portland Housing Bureau

DP Type

Technical Adjustments

Request Name: 10916 -Technical Adjustments

Package Description

These adjustments are related to technical budget or accounting requirements, and do not increase the total appropriation of the funds involved.

Service Impacts

These adjustments have no impact on service levels or projects in the current fiscal year.

Equity Impacts

These adjustments will help ensure the implementation, delivery, and performance of all programs in support of the Bureau's mission of building and preserving quality, affordable housing; supporting programs that help low income Portlanders find, rent, buy, retain and repair their homes; convening partners to meet the housing needs of the people of Portland; and reaching out to Communities of Color to ensure their participation in the economic opportunities that quality housing investments create.

CBO Analysis

	2020-21 FALL Requested Adj	Fall Adopted Total
Personnel	0	0
External Materials and Services	0	0
Contingency	380,000	0
Debt Service	-380,000	0

	2020-21 FALL Requested Adj	Fall Adopted Total
Beginning Fund Balance	550,000	0
Taxes	-550,000	0
Beginning Fund Balance	475,000	0
Taxes	-475,000	0
Beginning Fund Balance	1,200,000	0
Taxes	-1,200,000	0

HC - Portland Housing Bureau

DP Type

Other Adjustments

Request Name: 10917 -Project Rebudgets

Package Description

Rebudgeting of multi-family affordable housing projects and single-family homeownership and homeowner retention projects that cross fiscal years.

Service Impacts

This package will allow the bureau to continue with projects already awarded and under contract or construction.

Equity Impacts

The Multi Family Rental Project Financing program supports reaching out to Communities of Color to ensure their participation in economic opportunities that quality housing investments create. Success means that the sustainable, high quality housing units, targeting low and very-low income clients, in high opportunity areas are being produced in a fiscally sound manner and being leased in an inclusive and equitable manner with measurable outcomes. PHB development partners are required to report on their efforts to provide contracting opportunities to disadvantaged minority, women and emerging small business – service disabled veterans (DMWESB-SDV), and must comply with federal and local low-income workforce utilization goals.

PHB Home Retention Programs seek to advance equity by targeting vulnerable populations; low income, elderly and Communities of Color to ensure their participation in the economic opportunities that quality housing investments create and provides the means to safely and affordably retain their homes and age in place. Success in this program would increase homeowners' quality-of-life, support neighborhood stabilization and generational wealth, and improve health outcomes for these vulnerable populations. PHB partners with a host of culturally specific service providers who support Portland residents with one-on-one and group financial counseling. Partners leverage additional resources necessary to support households' homeownership goals in the City of Portland, a tight and competitive housing market, targeting Communities of Color and communities that have been displaced or at risk of displacement, to ensure access, and their participation in the economic opportunities that quality housing investments create.

Down payment assistance is necessary in addressing the homeownership disparities, and policies should improve access and lessen challenges and barriers in obtaining resources. Success in this program would increase the number of homeowners from Communities of Color, improve their financial wellbeing, and strengthen trust from the community (as it relates to past government actions).

CBO Analysis

	2020-21 FALL Requested Adj	Fall Adopted Total
External Materials and Services	1,250,000	0
External Materials and Services	0	0
External Materials and Services	38,000	0
External Materials and Services	1,319,980	0
External Materials and Services	100,200	0
External Materials and Services	523,638	0
External Materials and Services	0	0
External Materials and Services	61,477	0

	2020-21 FALL Requested Adj	Fall Adopted Total
Miscellaneous	1,250,000	0
Intergovernmental	38,000	0
Intergovernmental	1,319,980	0
Intergovernmental	100,200	0
Intergovernmental	523,638	0
Beginning Fund Balance	61,477	0

HC - Portland Housing Bureau

DP Type

Other Adjustments

Request Name: 10928 -Property and Bond Fund Adjustments

Package Description

Adjustments to holding and operating costs for the Westwind, Mt. Tabor, Joyce, and Fairfield properties. Adjust interfund loans to PDX Bond and Metro grants funds to match Council ordinance and provide cash flow pending reimbursement of qualified City program delivery costs.

Service Impacts

These adjustments will allow the bureau to continue with the implementation of both the PDX Affordable Housing Bond and the Metro Affordable Housing Bond.

Equity Impacts

The Portland Housing Bond program supports the PHB mission of addressing the housing needs of the people of Portland through reaching out to Communities of Color to ensure their participation in the economic opportunities that quality housing investments create. Success means that the Portland Housing Bond Measure 26-179 production goals have all been met and that Priority Communities have improved access to these homes.

The Metro Bond program supports the PHB mission of addressing the housing needs of the people of Portland through reaching out to Communities of Color to ensure their participation in the economic opportunities that quality housing investments create. Success means that the Metro Bond production goals have all been met and that priority communities identified in PHB's implementation strategy have access to the affordable housing created.

PHB's work with Metro is guided by the following four principles which were derived from Metro's Strategy to Advance Racial Equity, Diversity, and Inclusion and conversations with key stakeholders who participated in a six-month public process convened prior to the referral of the Measure 1) Lead with racial equity;

- 2) Create opportunity for those in need;
- 2) Create opportunity throughout the region, including to help prevent displacement in changing neighborhoods where communities of color live today; and
- 4) Ensure long-term benefits and good use of public dollars.

CBO Analysis

	2020-21 FALL Requested Adj	Fall Adopted Total
Fund Transfers - Expense	11,250	0
Fund Transfers - Expense	11,250	0
Contingency	-668,283	0
Debt Service	3,098,722	0
Fund Transfers - Expense	175,000	0
External Materials and Services	170,000	0
External Materials and Services	35,000	0
External Materials and Services	175,000	0
Contingency	-7,523	0
Internal Materials and Services	7,523	0
External Materials and Services	11,250	0

	2020-21 FALL Requested Adj	Fall Adopted Total
Interagency Revenue	11,250	0
Fund Transfers - Revenue	11,250	0
Beginning Fund Balance	818,568	0

F4 - BMP Amendment Report (Fall Adopted)

Run Date: 9/9/20

CBO Discussion & Recommendations

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Fund Transfers - Revenue	1,763,871	0
Miscellaneous	23,000	0
Bond & Note Proceeds	598,722	0
Intergovernmental	-598,722	0
Beginning Fund Balance	170,000	0
Beginning Fund Balance	35,000	0
Fund Transfers - Revenue	175,000	0
Fund Transfers - Revenue	11,250	0
Bond & Note Proceeds	2,500,000	0
Intergovernmental	-4,418,265	0
Miscellaneous	1,918,265	0

HC - Portland Housing Bureau

DP Type

Encumbrance Carryover

Request Name: 10951 -FY 2019-20 GF Furlough Savings True-Up

Package Description

This request is a technical adjustment to true-up the furloughs taken in the prior budget year with the estimate for furloughs in the current budget year.

Service Impacts

Equity Impacts

CBO Analysis

	2020-21 FALL Requested Adj	Fall Adopted Total
Personnel	8,277	0

	2020-21 FALL Requested Adj	Fall Adopted Total
General Fund Discretionary	8,277	0

HC - Portland Housing Bureau

DP Type

Mid-Year Reduction

Request Name: 11054 -FY 2020-21 OMF I/A reductions

Package Description

Blended rent rate savings and delay of ITAX system charges for one year.

Service Impacts

N/A

Equity Impacts

N/A

CBO Analysis

	2020-21 FALL Requested Adj	Fall Adopted Total
Internal Materials and Services	-13,285	0
Contingency	31,833	0
Internal Materials and Services	-31,833	0
Contingency	30,692	0
Internal Materials and Services	-30,692	0
Contingency	47,291	0
Internal Materials and Services	-47,291	0

	2020-21 FALL Requested Adj	Fall Adopted Total
General Fund Discretionary	-13,285	0

HC - Portland Housing Bureau

DP Type

Mid-Year Reduction

Request Name: 11056 -General Fund Reductions

Package Description

This package reflects the reduction of \$49,000 as directed by CBO consisting of \$39,000 from the General Fund and \$10,000 from the Short Term Rental Tax fund (which receives a General Fund transfer). In the event Rental Registration Fee income was slowed by economic conditions surrounding the pandemic the bureau created a reserve. This reserve totaled \$554,890; however it appears that Rental Registration Fee revenues have not been adversely impacted by the pandemic. Of the reserve amount, the bureau is using \$39,000 to meet the required General Fund reduction. The bureau is also using funds from a contingency reserve to meet the \$10,000 reduction in the Short Term Rental Tax fund.

Service Impacts

N/A

Equity Impacts

N/A

CBO Analysis

	2020-21 FALL Requested Adj	Fall Adopted Total
Contingency	-39,000	0
Contingency	-10,000	0

	2020-21 FALL Requested Adj	Fall Adopted Total
General Fund Discretionary	-39,000	0
Fund Transfers - Revenue	-10,000	0

HC - Portland Housing Bureau

DP Type

Contingency

Request Name: 11058 -Reprogram Rental Registration Reserve

Package Description

The bureau is requesting the reprogramming of General Fund resources held in reserve in its budget to Rent Relief efforts in East Portland and to address equipment and software needs in the continuing remote work environment. In the FY 20-21 Proposed Budget, PHB reserved General Fund resources originally programmed for NE Portland (\$484,100) in the event Rental Registration Fee income was slowed by economic conditions surrounding the pandemic. In addition, the bureau reserved other savings from interagency adjustments during subsequent phases of the budget process. This reserve totaled \$554,890; however it appears that Rental Registration Fee revenues have not been adversely impacted by the pandemic. Of the reserve amount, \$39,000 is used to meet the required General Fund reduction, \$500,000 would go to East Portland Rent Relief, and \$15,269 would go to address equipment and software needs in the continuing remote work environment.

Service Impacts

Funds will be allocated to serve households referred by culturally specific providers and other community organizations serving BIPOC communities to provide COVID-19 rent assistance in East Portland. This will supplement the existing COVID-19 rent assistance program, serving at least an estimated additional 75 households, providing up to 3 months of rent assistance. Providers will be invited to participate and receive: a) soft allocation of rent assistance resources through an MOU with Home Forward/Multnomah County; and b) admin/program fee through a direct contract with Portland Housing Bureau.

Equity Impacts

Based on the strategic approach of deploying funding through community providers with a prioritization of funding culturally specific partners serving BIPOC communities, we project more than 75% households will be from BIPOC communities. Demographics will be collected for households served, including, but not limited to: race/ethnicity, age, gender, household size, income level, zip code, primary language spoken and disability status.

CBO Analysis

	2020-21 FALL Requested Adj	Fall Adopted Total
Contingency	-515,890	0
External Materials and Services	515,890	0

Bureau Performance Narrative

Portland Housing Bureau

Each quarter, the Portland Housing Bureau (PHB) and Joint Office of Homeless Services publish program performance outcome reports and dashboards. These reports and dashboards can be found on each agency's website and are designed to present interested stakeholders with an easily understandable summary of program performance and outcomes. The 2020 -21 Adopted Budget performance measures are a subset of the performance data contained in the agency reports and include 30 performance measures across ten program areas. Nearly all program areas met or exceeded proposed performance targets for 2019-20. The Housing Bureau opened 654 units in 2019- 2020, far exceeding its annual target of 500 newly affordable units. All PHB regulated rental units are affordable to families with incomes at or below 80% Area Median Income (AMI) with the majority of units affordable at or below 60% AMI . The Joint Office of Homeless Services placed 5,090 individuals in permanent housing in FY 2019-20 and anticipates placing 5,500 individuals in permanent housing in FY 2020-21. Homeless services performance measures are linked to the strategic goals proposed by the A Home For Everyone (AHFE) coordinating board and approved by the AHFE Executive Committee. The Portland Housing Bureau and Joint Office of Homeless Services expect to meet or exceed proposed goals for the FY 2020-21 budget.

	Key Performance Measures	Measure Type Name	FY 2017-18 Actuals	FY 2018-19 Actuals	FY 2019-20 Target	FY 2019-20 Actuals	FY 2020-21 Target	Strategic Target	Details
HC_0070	Housing units opened that are newly affordable	OUTPUT	804	878	500	654	500	500	Program actuals exceeded strategic target
HC_0105	Total number of homeless individuals placed in permanent housing	OUTPUT	5,591	5,770	5,900	5,090	5,500	5,500	Program actuals were below strategic target
HC_0106	Retention rate of households placed in permanent housing at 12 months	OUTCOME	59%	64%	75%	61%	75%	75%	Program actuals were below strategic target
HC_0107	Number of individuals prevented from becoming homeless	OUTPUT	7,458	7,220	8,000	7,300	7,900	7,900	Program actuals were below strategic target
HC_0111	Percentage of households receiving homebuyer education or counseling and subsequently purchasing a home	OUTCOME	13%	25%	10%	13%	10%	10%	Program actuals exceeded strategic target
HC_0113	Percentage of households receiving home repairs and retaining their homes 12 months after services	OUTCOME	80%	94%	80%	89%	80%	80%	Program actuals exceeded strategic target
HC_0121	Percentage utilization of minority contracts in housing construction (contract \$ awarded)	OUTCOME	12%	17%	15%	15%	10%	10%	Program actuals were as expected
HC_0127	Percentage of households from Communities of Color receiving PHB homebuyer subsidy	OUTCOME	N/A	0	100%		60%	60%	Program actuals exceeded strategic target
HC_0128	Number of people housed in newly opened affordable rental units	OUTCOME	N/A	0	1,000	1,219	1,000	1,000	Program actuals were higher than expected
HC_0129	Retention rate of households placed in permanent housing at 12 months (of those successfully contacted)	OUTCOME	0	0	0	85%	80%	80%	Program actuals were higher than expected

Portland Housing Bureau
 Prior Year Performance Reporting

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HC_0130	Number of households provided housing stabilization	OUTPUT	0	0	0	272	245	245	Program actuals were higher than expected
HC_0132	Number of households provided landlord/tenant hotline services	OUTPUT	0	0	0	2,636	3,145	3,145	Program actuals were lower than expected
HC_0133	Number of landlords/tenants provided face to face services	OUTPUT	0	0	0	944	670	670	Program actuals were higher than expected
HC_0135	Percentage of privately developed residential units permitted as affordable through the Inclusionary Housing (IH) program	OUTCOME	0	0	0	12%	10%	10%	Program actuals exceeded strategic target
HC_0136	Percentage of Inclusionary Housing (IH) units affordable at 60% AMI or below	OUTCOME	0	0	0	63%	50%	50%	Program actuals exceeded strategic target

Other Performance Measures	Measure Type Name	FY 2017-18 Actuals	FY 2018-19 Actuals	FY 2019-20 Target	FY 2019-20 Actuals	FY 2020-21 Target	Strategic Target	Details
HC_0037	Count of households receiving homebuyer education or counselling	1,169	976	975	1,429	975	975	Program actuals exceeded strategic target
HC_0069	Vacancy rate of units built 0% to 60% median family income	3%	3%	3%	3%	3%	3%	Program actuals were as expected
HC_0083	Administrative costs as a percentage of bureau level budget	5%	5%	5%	5%	5%	5%	Program actuals were as expected
HC_0108	Average length of time (days) spent in homeless shelter (all populations)	48	64	110	67	85	85	Program actuals exceeded strategic target (Lower is better)
HC_0109	Number of individuals who accessed homeless services, but who had not accessed homeless services in the previous two years	5,018	5,410	5,000	5,360	6,400	6,400	Program actuals exceeded strategic target
HC_0110	Percentage of households moved from homelessness into housing that subsequently return to homelessness	28%	26%	26%	23%	25%	25%	Program actuals exceeded strategic target (Lower is better) Program actuals were below strategic target.
HC_0112	Number of households receiving home repairs	721	674	600	535	500	500	Performance measure targets for FY 2020-21 adjusted to reflect shift in funding and COVID-19 related challenges faced by partner organizations.

Portland Housing Bureau

Prior Year Performance Reporting

Run Date: 9/9/20

Run Time: 1:19:46 PM

Other Performance Measures	Measure Type Name	FY 2017-18 Actuals	FY 2018-19 Actuals	FY 2019-20 Target	FY 2019-20 Actuals	FY 2020-21 Target	Strategic Target	Details
HC_0114 Number of households receiving indirect assistance through foregone revenue (mortgage credit certificate, limited tax exemption, and system development charge exemption)	WORKLOAD	104	266	140	176	140	140	Program actuals exceeded strategic target
HC_0115 Affordable housing units preserved	OUTPUT	183	176	150	172	150	150	Program actuals exceeded strategic target
HC_0116 Rolling three-year average of total units opened and preserved	OUTPUT	688	899	714	956	897	897	Program actuals exceeded strategic target
HC_0117 Average investment per rental housing unit	EFFICIENCY	\$100,000	\$96,000	\$110,000	\$85,000	\$125,000	\$125,000	Program actuals exceeded strategic target (lower is better)
HC_0118 Percentage of housing units opened or preserved in high opportunity areas	OUTCOME	60%	61%	50%	60%	50%	50%	Program actuals exceeded strategic target
HC_0119 Administrative costs as a rolling three-year average	EFFICIENCY	7%	7%	7%	7%	7%	7%	Program actuals were as expected
HC_0120 Percentage utilization of minority, women, and emerging small business contracts in housing construction (contract \$ awarded)	OUTCOME	20%	23%	20%	30%	20%	20%	Program actuals exceeded strategic target
HC_0131 Number of households provided fair housing services	OUTPUT	0	0	0	860	700	700	Program actuals were higher than expected
HC_0134 Number of landlords/tenants provided outreach, education, and engagement services	OUTPUT	0	0	0	14,647	13,500	13,500	Program actuals were higher than expected
HC_0137 Percentage of family sized Inclusionary Housing (IH) units permitted	OUTCOME	0	0	0	20%	15%	15%	Program actuals exceeded strategic target

This code is a unique identifier for each individual measure. The first two letters denote the bureau data owner of that measure.

This is a short name used to refer to the measure within the system when a longer title is infeasible. It is not used for publishing purposes.

This is the published title of the performance measure.

For measures to be graphed in the budget document, include a brief title. Capitalize each word except conjunctions (e.g. and, as, if, but).

This is a brief (1-2 sentences) description of the outcomes for this performance measure. Explain apparent trends; compare to fiscal year and/or strategic targets. This is published on the performance dashboard for all measures, and in the budget document for graphed measures.

This denotes whether or not this measure should be published in the budget document.

These fields can be updated in BFM-->Performance Mngmt-->Performance Measure Dimension-->Attributes Tab

These fields

Performance Measure Cd	Performance Measure Name	Measure Title	Graph Title	Graph Description	Publish Measure	M
HC_0037	# of households receiving homebuyer ed or counsl	Count of househ	NA	NA	YES	NO
HC_0069	Vacancy Rate of Units Built 0 to 60% AMI	Vacancy rate of	NA	NA	YES	NO
HC_0070	Housing units opened that are newly affordable	Housing units op	Housing Units O	PHB opened 87	YES	YES
HC_0083	Admin Costs as a % Of Bureau Level Budget	Administrative c	NA	NA	YES	NA

<p>denotes whether or not this measure could be graphed in the budget document. Measures are encouraged to graph their Key Performance Measures, minimum</p> <p>This indicates the accuracy and reliability of the data. High: data gathered by dependable processes and validated. Low: data gathered without dependable process, without validation, or without reliable method of quality assurance.</p> <p>This indicates the accuracy and reliability of the data. High: data gathered by dependable processes and validated. Low: data gathered without dependable process, without validation, or without reliable method of quality assurance.</p> <p>Check the box if this measure is a Key Performance Measure. All measures should either be assigned "YES" or "NO."</p> <p>This indicates how often the component variables of the measure are collected (options include transactional, weekly, monthly, quarterly, or intermittently).</p> <p>This indicates whether this measure is a workload, output, outcome, or efficiency.</p> <p>Aggregation is required to be selected when creating a new measure. "1" indicates that the measure can be summed across all accounting periods. "2" indicates the average of the data in the accounting periods should be taken.</p>									<p>For measures to be graphed in the budget document, enter a unit of measurement to be displayed on the Y-axis of the graph.</p> <p>Mathematical equation used to calculate the measure.</p> <p>This indicates the year that the bureau expects to achieve the strategic target (enter 4-digit year). For fiscal years, enter the year in which the FY ends.</p> <p>Cite the Citywide, bureau, or state/regional strategic plan referenced in the creation of the strategic target.</p> <p>This describes how data collected for the measure. Include collection methods (survey, form, print report, data source, logs, spreadsheets, database collection, time frame, and data storage location).</p>				
<p>can be updated in BFM-->Performance Mngmt-->Performance Measure Dimension-->Groups Tab. Please use the magnifying glass and select from the available options</p>									<p>These fields can be updated in BFM-->Performance</p>				
Graph Measure	Desired Direction	Reliability	Division	Datatype	KPM	Frequency	Measure Type	Aggregation	Unit of Measure	Formula	Target Year	Strategic Plan	Collection Method
	NONE	NA		0	NA	NA	WORKLOAD	1	NA	Count of househ	2020-2021	2035 Comprehe	Participar
	NONE	NA		6	NA	NA	OUTCOME	1	Percentage	Percentage of v	2020-2021	2035 Comprehe	Snapshot
	UP	HIGH		0	YES	QUARTERLY	OUTPUT	1	Units	New housing uni	2020-2021	2035 Comprehe	Count of
	DOWN	NA		6	NA	NA	EFFICIENCY	1	NA	(blank)	NA	(blank)	NA

<p>describes data is collected through this measure. The data collection methods vary (surveys, focus groups, etc.), and each measure has a unique check (e.g., focus groups) to ensure data accuracy. The name of the data source is listed on the dashboard.</p>	<p>First and last name of the person overseeing the program reflected by the measure. Reported as "Bureau data source program manager" on performance dashboard.</p>	<p>Email address of City employee overseeing the bureau program or operations reflected by the measure.</p>	<p>First and last name of the City employee responsible for collecting and reporting the data for this specific measure. Reported as "Bureau data source contact" in the Performance Measure methodology appendix.</p>	<p>Email address of the City employee responsible for collecting and reporting the data for this specific measure.</p>	<p>Relevant URL, "for more info" to direct reader to program webpages, press releases, how to get involved, annual report, budget, or bureau home page.</p>
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Performance Mngmt-->Performance Measure Dimension-->Description Tab

<p>Measure ID</p>	<p>Program Mgr</p>	<p>Program Mgr E-Mail</p>	<p>Data Contact</p>	<p>Data Contact E-Mail</p>	<p>URL</p>
10001	Dana Shephard	Dana.Shephard@portland.gov	Antoinette Pietk	Antoinette.Pietk@portland.gov	(blank)
10002	Jill Chen	Jill.Chen@portland.gov	Antoinette Pietk	Antoinette.Pietk@portland.gov	(blank)
10003	Jill Chen	Jill.Chen@portland.gov	Antoinette Pietk	Antoinette.Pietk@portland.gov	http://www.portland.gov
10004	Antoinette Pietk	Antoinette.Pietk@portland.gov	Antoinette Pietk	Antoinette.Pietk@portland.gov	(blank)

HC_0105	Number of homeless individuals placed in perm ho	Total number of	Total Number of JOHS placed 5,	YES	YES
HC_0106	Retention rate of HH placed in housing at 12 mo	Retention rate of	Retention Rate c A goal of the bur	YES	YES
HC_0107	# individuals prevented from becoming homeless	Number of indivi	Number of Indivi NA	YES	NO
HC_0108	Average length of time spent in homeless shelter	Average length	NA NA	YES	NO
HC_0109	# of individuals who accessed homeless services, but who had not accessed homeless services in the previous two years	Number of indivi	NA NA	YES	NO
HC_0110	% of households returning to homelessness	Percentage of h	Percentage of H For formerly ho	YES	NO
HC_0111	% of low or moderate income households receiving	Percentage of h	Percentage of lo NA	YES	NO
HC_0112	Number of households receiving home repairs	Number of hous	NA NA	YES	NO
HC_0113	% of HH receiving home repairs & retaining home	Percentage of h	Percentage of h NA	YES	NO
HC_0114	# of hh receiving indirect assistance through fo	Number of hous	NA NA	YES	NO
HC_0115	Affordable housing units preserved	Affordable housi	NA NA	YES	NO
HC_0116	Rolling three year average of total units opened	Rolling three-ye	NA NA	YES	NO
HC_0117	Average investment per rental housing unit	Average investm	NA NA	YES	NO
HC_0118	Percentage of housing units opened or preserved	Percentage of h	% housing units PHB targets fun	YES	NO
HC_0119	Administrative costs as a rolling three year ave	Administrative c	NA NA	YES	NO
HC_0120	% utilization of MWESB contracts in construction	Percentage utiliz	Percentage cont NA	YES	NO
HC_0121	% utilization of minority (contract \$ awarded)	Percentage utiliz	Percentage utiliz NA	YES	NO
HC_0127	% households from Communities of Color receiving PHB homebuyer loans	Percentage of h		YES	NA
HC_0128	# of people housed in newly opened affordable rental units	Number of peopl		YES	NA
HC_0129	Retention rate of households placed in permanent housing at 12 months (of those successfully contacted)	Retention rate of		YES	NO
HC_0130	Number of households provided housing stabilization	Number of hous		YES	NO
HC_0131	Number of households provided fair housing services	Number of hous		YES	NO
HC_0132	Number of households provided landlord/tenant hotline services	Number of hous		YES	NO
HC_0133	Number of landlords/tenants provided face to face services	Number of landl		YES	NO
HC_0134	Number of landlords/tenants provided outreach, education, and engagement services	Number of landl		YES	NO
HC_0135	Percentage of privately developed residential units permitted as affordable through the Inclusionary Housing (IH) program	Percentage of pr		YES	NO
HC_0136	Percentage of Inclusionary Housing (IH) units affordable at 60% AMI or below	Percentage of In		YES	NO
HC_0137	Percentage of family sized Inclusionary Housing (IH) units permitted	Percentage of fa		YES	NO

UP	HIGH		0	YES	QUARTERLY	OUTPUT	1	Individuals	Count of homele	2018-19	A Home For Eve	Funding f
UP	HIGH		6	YES	QUARTERLY	OUTCOME	1	Percentage	Percentage of h	2018-2019	A Home For Eve	Percenta
UP	HIGH		0	YES	QUARTERLY	OUTPUT	1	Individuals	Count of individu	2018-2019	A Home For Eve	Funding f
DOWN	NA		0	NA	NA	OUTCOME	1	NA	(blank)	NA	(blank)	NA
DOWN	NA		0	NA	NA	OUTCOME	1	NA	(blank)	NA	(blank)	NA
DOWN	HIGH		6	NO	QUARTERLY	OUTCOME	1	Recidivism Rate	Percentage of h	NA	Administrative	Percenta
UP	HIGH		6	YES	QUARTERLY	OUTCOME	1	Percent	% of low or mod	2018-19	2035 Comprehe	Percenta
UP	NA		0	NO	QUARTERLY	WORKLOAD	1	NA	(blank)	NA	(blank)	NA
UP	MEDIUM		6	YES	QUARTERLY	OUTCOME	1	NA	# of hh receiving	2018-19	2035 Comprehe	Percenta
UP	NA		0	NO	NA	WORKLOAD	1	NA	(blank)	NA	(blank)	NA
UP	NA		0	NA	NA	OUTPUT	1	NA	(blank)	NA	(blank)	NA
UP	NA		0	NA	NA	OUTPUT	1	NA	(blank)	NA	(blank)	NA
DOWN	NA		3	NA	NA	EFFICIENCY	1	NA	(blank)	NA	(blank)	NA
UP	HIGH		6	NO	QUARTERLY	OUTCOME	1	% units opened	% of total PHB-f	NA	Admin data colle	Percenta
DOWN	NA		6	NA	NA	EFFICIENCY	1	NA	(blank)	NA	(blank)	NA
UP	HIGH		6	NO	MONTHLY	OUTCOME	1	Percent	% contract dollar	NA	Procurement dat	Percenta
UP	HIGH		6	YES	MONTHLY	OUTCOME	1	Percent	% total contract	2018-2019	2035 Comprehe	Percenta
UP	HIGH	0	6	YES	ANNUAL	OUTCOME	0	Percent	Percentage of h	2020-2021	2035 Comprehe	Race anc
UP	HIGH	0	0	YES	ANNUAL	OUTCOME	1	Individuals	Count of individu	2020-2021	2035 Comprehe	
UP	HIGH	HCPG	6	YES	ANNUAL	OUTCOME	1	Percent	% contacted wh	2020-21	A Home For Eve	Percenta
UP	HIGH	HCPG	0	YES	QUARTERLY	OUTPUT	1	Households	Aggregate outco	2020-2021	Comprehensive	Subrecipi
UP	HIGH	HCPG	0	NO	QUARTERLY	OUTPUT	1	Households	Aggregate outco	2020-2021	Comprehensive	Subrecipi
UP	HIGH	HCPG	0	YES	ANNUAL	OUTPUT	1	Households	Annual total of c	2020-2021	Comprehensive	Call data
UP	HIGH	HCPG	0	YES	ANNUAL	OUTPUT	1	Individuals	Annual total of in	2020-2021	Comprehensive	Data is tr
UP	HIGH	HCPG	0	NO	ANNUAL	OUTPUT	1	Individuals	Annual total of p	2020-2021	Comprehensive	Registrati
UP	HIGH	HCPG	6	YES	ANNUAL	OUTCOME	1	Percent	Percentage of pr	2020-2021	Comprehensive	Data colle
UP	HIGH	HCPG	6	YES	ANNUAL	OUTCOME	1	Percent	Percentage of pr	2020-2021	Comprehensive	Data colle
UP	HIGH	HCPG	6	NO	ANNUAL	OUTCOME	1	Percent	Percentage of pr	2020-21	Comprehensive	Data colle

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These fields can be updated in BFM-->Chart of Accounts-->Performance Measure Dimension-->Attributes Tab

Performance Measure Cd	Performance Measure Name	Measure Title	Graph Title	Graph Description	Actv FI	F M
HC_0037	# of households receiving homebuyer ed or counsl	Count of househ	NA	NA	1	YES
HC_0069	Vacancy Rate of Units Built 0 to 60% AMI	Vacancy rate of	NA	NA	1	YES
HC_0070	Housing units opened that are newly affordable	Housing units op	Housing Units O	PHB opened 87	1	YES
HC_0083	Admin Costs as a % Of Bureau Level Budget	Administrative c	NA	NA	1	YES
HC_0105	Number of homeless individuals placed in perm ho	Total number of	Total Number of	JOHS placed 5,	1	YES
HC_0106	Retention rate of HH placed in housing at 12 mo	Retention rate of	Retention Rate c	A goal of the bur	1	YES
HC_0107	# individuals prevented from becoming homeless	Number of indivi	Number of Indivi	NA	1	YES
HC_0108	Average length of time spent in homeless shelter	Average length	NA	NA	1	YES
HC_0109	# of individuals who accessed homeless services, but who had not accessed homeless services in the previous two years	Number of indivi	NA	NA	1	YES
HC_0110	% of households returning to homelessness	Percentage of h	Percentage of H	For formerly ho	1	YES
HC_0111	% of low or moderate income households receiving	Percentage of h	Percentage of lo	NA	1	YES
HC_0112	Number of households receiving home repairs	Number of hous	NA	NA	1	YES
HC_0113	% of HH receiving home repairs & retaining home	Percentage of h	Percentage of h	NA	1	YES
HC_0114	# of hh receiving indirect assistance through fo	Number of hous	NA	NA	1	YES
HC_0115	Affordable housing units preserved	Affordable housi	NA	NA	1	YES
HC_0116	Rolling three year average of total units opened	Rolling three-ye	NA	NA	1	YES
HC_0117	Average investment per rental housing unit	Average investm	NA	NA	1	YES
HC_0118	Percentage of housing units opened or preserved	Percentage of h	% housing units	PHB targets fun	1	YES
HC_0119	Administrative costs as a rolling three year ave	Administrative c	NA	NA	1	YES
HC_0120	% utilization of MWESB contracts in construction	Percentage utiliz	Percentage cont	NA	1	YES
HC_0121	% utilization of minority (contract \$ awarded)	Percentage utiliz	Percentage utiliz	NA	1	YES
HC_0127	% households from Communities of Color receiving PHB homebuyer loans	Percentage of h			1	YES

These fields can be updated in BFM-->Chart of Accounts-->Performance Measure Dimension-->Groups Tab. Please use the magnifying glass and select from the available options

These fields can be updated in B

Publish Measure	Graph Measure	Desired Direction	Reliability	Division	Datatype	KPM	Frequency	Measure Type	Aggregation	Unit of Measure	Formula	Target Year	Strate Pla
	NO	NONE	NA		0	NA	NA	WORKLOAD	1	NA	Count of househ 2020-2021		2035 Cor
	NO	NONE	NA		6	NA	NA	OUTCOME	1	Percentage	Percentage of v 2020-2021		2035 Cor
	YES	UP	HIGH		0	YES	QUARTERLY	OUTPUT	1	Units	New housing uni2020-2021		2035 Cor
	NA	DOWN	NA		6	NA	NA	EFFICIENCY	1	NA	(blank)	NA	(blank)
	YES	UP	HIGH		0	YES	QUARTERLY	OUTPUT	1	Individuals	Count of homele 2018-19		A Home I
	YES	UP	HIGH		6	YES	QUARTERLY	OUTCOME	1	Percentage	Percentage of h 2018-2019		A Home I
	NO	UP	HIGH		0	YES	QUARTERLY	OUTPUT	1	Individuals	Count of individu2018-2019		A Home I
	NO	DOWN	NA		0	NA	NA	OUTCOME	1	NA	(blank)	NA	(blank)
	NO	DOWN	NA		0	NA	NA	OUTCOME	1	NA	(blank)	NA	(blank)
	NO	DOWN	HIGH		6	NO	QUARTERLY	OUTCOME	1	Recidivism Rate	Percentage of h NA		Adminis
	NO	UP	HIGH		6	YES	QUARTERLY	OUTCOME	1	Percent	% of low or mod 2018-19		2035 Cor
	NO	UP	NA		0	NO	QUARTERLY	WORKLOAD	1	NA	(blank)	NA	(blank)
	NO	UP	MEDIUM		6	YES	QUARTERLY	OUTCOME	1	NA	# of hh receiving 2018-19		2035 Cor
	NO	UP	NA		0	NO	NA	WORKLOAD	1	NA	(blank)	NA	(blank)
	NO	UP	NA		0	NA	NA	OUTPUT	1	NA	(blank)	NA	(blank)
	NO	UP	NA		0	NA	NA	OUTPUT	1	NA	(blank)	NA	(blank)
	NO	DOWN	NA		3	NA	NA	EFFICIENCY	1	NA	(blank)	NA	(blank)
	NO	UP	HIGH		6	NO	QUARTERLY	OUTCOME	1	% units opened	% of total PHB-f NA		Admin da
	NO	DOWN	NA		6	NA	NA	EFFICIENCY	1	NA	(blank)	NA	(blank)
	NO	UP	HIGH		6	NO	MONTHLY	OUTCOME	1	Percent	% contract dolla NA		Procurer
	NO	UP	HIGH		6	YES	MONTHLY	OUTCOME	1	Percent	% total contract 2018-2019		2035 Cor
	NA	UP	HIGH	0	6	YES	ANNUAL	OUTCOME	0	Percent	Percentage of h 2020-2021		2035 Co

FM-->Chart of Accounts-->Performance Measure Dimension-->Description Tab							Contact your CBO analyst to update this data	Contact your CBO analyst to update this data		Update this value in Form 1800	Update this value in Form 1800	Update this value in Form 1800
Logic	Collection Method	Program Mgr	Program Mgr E-Mail	Data Contact	Data Contact E-Mail	URL	FY 2017-18 Actuals	FY 2018-19 Actuals	FY 2019-20 Target	FY 2019-20 Actuals	FY 2020-21 Target	Strategic Target
Comprehensive	Participant data	Dana Shephard	Dana.Shephard	Antoinette Pietk	Antoinette.Pietk	(blank)	1,169	976	975	1,429	975	975
Comprehensive	Snapshot of WC	Jill Chen	Jill.Chen@portla	Antoinette Pietk	Antoinette.Pietk	(blank)	3%	3%	3%	3%	3%	3%
Comprehensive	Count of newly a	Jill Chen	Jill.Chen@portla	Antoinette Pietk	Antoinette.Pietk	http://www.portla	804	878	500	654	500	500
	NA	Antoinette Pietk	Antoinette.Pietk	Antoinette Pietk	Antoinette.Pietk	(blank)	5%	5%	5%	5%	5%	5%
For Eve	Funding for plac	Sally Erickson	Sally.Erickson@	Antoinette Pietk	Antoinette.Pietk	https://multco.us	5,591	5,770	5,900	5,090	5,500	5,500
For Eve	Percentage of h	Sally Erickson	Sally.Erickson@	Antoinette Pietk	Antoinette.Pietk	http://www.portla	59%	64%	75%	61%	75%	75%
For Eve	Funding for hom	Sally Erickson	Sally.Erickson@	Antoinette Pietk	Antoinette.Pietk	https://multco.us	7,458	7,220	8,000	7,300	7,900	7,900
	NA	Sally Erickson	Sally.Erickson@	Antoinette Pietk	Antoinette.Pietk	(blank)	48	64	110	67	85	85
	NA	Sally Erickson	Sally.Erickson@	Antoinette Pietk	Antoinette.Pietk	(blank)	5,018	5,410	5,000	5,360	6,400	6,400
strative	Percentage of h	Sally Erickson	Sally.Erickson@	Antoinette Pietk	Antoinette.Pietk	http://www.portla	28%	26%	26%	23%	25%	25%
Comprehensive	Percentage of lo	Dana Shephard	Dana.Shephard	Antoinette Pietk	Antoinette.Pietk	http://www.portla	13%	25%	10%	13%	10%	10%
	NA	Dana Shephard	Dana.Shephard	Antoinette Pietk	Antoinette.Pietk	(blank)	721	674	600	535	500	500
Comprehensive	Percentage of h	Dana Shephard	Dana.Shephard	Antoinette Pietk	Antoinette.Pietk	http://www.portla	80%	94%	80%	89%	80%	80%
	NA	Dory Van Bockel	Dory.VanBockel	Antoinette Pietk	Antoinette.Pietk	(blank)	104	266	140	176	140	140
	NA	Jill Chen	Jill.Chen@portla	Antoinette Pietk	Antoinette.Pietk	(blank)	183	176	150	172	150	150
	NA	Jill Chen	Jill.Chen@portla	Antoinette Pietk	Antoinette.Pietk	(blank)	688	899	714	956	897	897
	NA	Jill Chen	Jill.Chen@portla	Antoinette Pietk	Antoinette.Pietk	(blank)	\$100,000	\$96,000	\$110,000	\$85,000	\$125,000	\$125,000
ata colle	Percentage of to	Jill Chen	Jill.Chen@portla	Antoinette Pietk	Antoinette.Pietk	http://www.portla	60%	61%	50%	60%	50%	50%
	NA	Antoinette Pietk	Antoinette.Pietk	Antoinette Pietk	Antoinette.Pietk	(blank)	7%	7%	7%	7%	7%	7%
ment dat	Percentage cont	Jill Chen	Jill.Chen@portla	Antoinette Pietk	Antoinette.Pietk	http://www.portla	20%	23%	20%	30%	20%	20%
Comprehensive	Percentage cont	Jill Chen	Jill.Chen@portla	Antoinette Pietk	Antoinette.Pietk	http://www.portla	12%	17%	15%	15%	10%	10%
Comprehensive	Race and ethnici	Dana Shephard	"dana.Shephard	Antoinette Pietk	Antoinette.Pietk	"	N/A	0	100%		60%	60%

HC_0128	# of people housed in newly opened affordable rental units	Number of peopl	1 YES
HC_0129	Retention rate of households placed in permanent housing at 12 months (of those successfully contacted)	Retention rate of	1 YES
HC_0130	Number of households provided housing stabilization	Number of hous	1 YES
HC_0131	Number of households provided fair housing services	Number of hous	1 YES
HC_0132	Number of households provided landlord/tenant hotline services	Number of hous	1 YES
HC_0133	Number of landlords/tenants provided face to face services	Number of landl	1 YES
HC_0134	Number of landlords/tenants provided outreach, education, and engagement services	Number of landl	1 YES
HC_0135	Percentage of privately developed residential units permitted as affordable through the Inclusionary Housing (IH) program	Percentage of pr	1 YES
HC_0136	Percentage of Inclusionary Housing (IH) units affordable at 60% AMI or below	Percentage of In	1 YES
HC_0137	Percentage of family sized Inclusionary Housing (IH) units permitted	Percentage of fa	1 YES

NA	UP	HIGH	0	0	YES	ANNUAL	OUTCOME	1	Individuals	Count of individu2020-2021	2035 Cor
NO	UP	HIGH	HCPG	6	YES	ANNUAL	OUTCOME	1	Percent	% contacted wh 2020-21	A Home I
NO	UP	HIGH	HCPG	0	YES	QUARTERLY	OUTPUT	1	Households	Aggregate outco 2020-2021	Compreh
NO	UP	HIGH	HCPG	0	NO	QUARTERLY	OUTPUT	1	Households	Aggregate outco 2020-2021	Compreh
NO	UP	HIGH	HCPG	0	YES	ANNUAL	OUTPUT	1	Households	Annual total of c 2020-2021	Compreh
NO	UP	HIGH	HCPG	0	YES	ANNUAL	OUTPUT	1	Individuals	Annual total of ir 2020-2021	Compreh
NO	UP	HIGH	HCPG	0	NO	ANNUAL	OUTPUT	1	Individuals	Annual total of p 2020-2021	Compreh
NO	UP	HIGH	HCPG	6	YES	ANNUAL	OUTCOME	1	Percent	Percentage of pr 2020-2021	Compreh
NO	UP	HIGH	HCPG	6	YES	ANNUAL	OUTCOME	1	Percent	Percentage of pr 2020-2021	Compreh
NO	UP	HIGH	HCPG	6	NO	ANNUAL	OUTCOME	1	Percent	Percentage of pr 2020-21	Compreh

mprehe	Jill Chen	Jill.Chen@portla	Antoinette Pietk	Antoinette.Pietk	N/A	0	1,000	1,219	1,000	1,000
For Eve Percentage cont	Steve Richard	Steve.Richard@	Antoinette Pietk	Antoinette.Pietk	https://multco.us	0	0	85%	80%	80%
ensive Subrecipient qua	Kim McCarty	Kim.McCarty@p	Antoinette Pietk	Antoinette.Pietk		0	0	272	245	245
ensive Subrecipient qua	Kim McCarty	Kim.McCarty@p	Antoinette Pietk	Antoinette.Pietk		0	0	860	700	700
ensive Call data is track	Kim McCarty	Kim.McCarty@p	Antoinette Pietk	Antoinette.Pietk		0	0	2,636	3,145	3,145
ensive Data is tracked i	Kim McCarty	Kim.McCarty@p	Antoinette Pietk	Antoinette.Pietk		0	0	944	670	670
ensive Registration dat	Kim McCarty	Kim.McCarty@p	Antoinette Pietk	Antoinette.Pietk		0	0	14,647	13,500	13,500
ensive Data collected th	Dory Van Bockel	Dory.VanBockel	Antoinette Pietk	Antoinette.Pietk		0	0	12%	10%	10%
ensive Data collected th	Dory Van Bockel	Dory.VanBockel	Antoinette Pietk	Antoinette.Pietk		0	0	63%	50%	50%
ensive Data collected th	Dory Van Bockel	Dory Van Bockel	Antoinette Pietk	Antoinette.Pietk		0	0	20%	15%	15%

Prior Year Fund Reconciliation Report

Portland Housing Bureau

100 - General Fund

EXPENDITURES	2019-20 Revised Budget	2019-20 Actuals	Percent of Actuals to Revised
Personnel	1,390,531	1,098,990	79.03%
External Materials and Services	36,497,819	35,917,053	98.41%
Internal Materials and Services	-443,666	-238,210	53.69%
Fund Transfers - Expense	322,340	322,340	100%
TOTAL EXPENDITURES	37,767,024	37,100,173	98.23%

REVENUES	2019-20 Revised Budget	2019-20 Actuals	Percent of Actuals to Revised
Charges for Services	0	1,062	
Miscellaneous	0	7,020	
General Fund Discretionary	37,661,394	0	0%
Interagency Revenue	105,630	101,039	95.65%
TOTAL REVENUES	37,767,024	109,120	0.29%

Expenditure Discussion

Personnel costs were 21% under expended due to the bureau's vacancies, which reached 20% by 6/30.

Internal Materials were under expended due to less bureau indirect being charged to other funds because of vacancies in program delivery staff. Total expenditures were within less than 2% of the budgeted amount.

Revenue Discussion

General Fund revenues were within estimate thresholds.

Prior Year Fund Reconciliation Report

Portland Housing Bureau

213 - Housing Investment Fund

EXPENDITURES	2019-20 Revised Budget	2019-20 Actuals	Percent of Actuals to Revised
Personnel	984,949	837,238	85%
External Materials and Services	1,847,372	1,639,545	88.75%
Capital Outlay	0	-300	
Debt Service	1,785,675	0	0%
Contingency	642,805	0	0%
Fund Transfers - Expense	985,026	884,326	89.78%
Ending Fund Balance	2,144,958	0	0%
TOTAL EXPENDITURES	8,390,785	3,360,809	40.05%

REVENUES	2019-20 Revised Budget	2019-20 Actuals	Percent of Actuals to Revised
Taxes	0	1,897,872	
Charges for Services	30,410	40,763	134.05%
Intergovernmental	284,648	240,539	84.5%
Miscellaneous	441,575	6,310,372	1,429.06%
Fund Transfers - Revenue	6,180,838	6,180,838	100%
Beginning Fund Balance	1,453,314	0	0%
TOTAL REVENUES	8,390,785	14,670,384	174.84%

Expenditure Discussion

Personnel costs were 15% under expended due to the bureau's vacancies, which reached 20% by 6/30. External Materials and Services were under expended primarily due to lower than anticipated pre-development disbursements for the Westwind project. Debt Service was under expended due to timing issues with interfund loans. Fund Transfers were under expended due to lower than anticipated transfers needed for fund closeouts.

Revenue Discussion

Miscellaneous revenues were over collected due to a transfer from Multnomah County for the Westwind project, the initial transfer of rental registration revenue from the Revenue Division happening before year-end, a loan payoff in the main HIF, and higher than anticipated interest earnings. Charges for Services were slightly higher due to and increase in activity for a homeownership program at year-end.

Prior Year Fund Reconciliation Report

Portland Housing Bureau

217 - Grants Fund

EXPENDITURES	2019-20 Revised Budget	2019-20 Actuals	Percent of Actuals to Revised
Personnel	501,274	545,624	108.85%
External Materials and Services	4,170,648	3,098,049	74.28%
Internal Materials and Services	55,650	0	0%
TOTAL EXPENDITURES	4,727,572	3,643,673	77.07%

REVENUES	2019-20 Revised Budget	2019-20 Actuals	Percent of Actuals to Revised
Charges for Services	0	1	
Intergovernmental	4,616,421	3,648,799	79.04%
Bond & Note Proceeds	111,151	0	0%
Miscellaneous	0	1,684	
TOTAL REVENUES	4,727,572	3,650,484	77.22%

Expenditure Discussion

External Materials and Services were under expended due to due to fewer than anticipated Lead Grant awards earlier in the fiscal year and under expenditures by the JOHS under the Emergency Solutions Grant (ESG). Internal Materials and Services were under expended due to indirect costs not being charged to the grant because of administration cap issues related to higher training costs as a result of staff turnover.

Revenue Discussion

The ESG and Lead grants are reimbursement grants, therefore the under collection of Intergovernmental revenue is a result of under expenditures as described below. Bond and Note Proceeds were under collected due to timing issues with interfund loans.

Prior Year Fund Reconciliation Report

Portland Housing Bureau

218 - Community Development Block Grant Fund

EXPENDITURES	2019-20 Revised Budget	2019-20 Actuals	Percent of Actuals to Revised
Personnel	1,375,473	1,161,595	84.45%
External Materials and Services	7,103,349	5,032,441	70.85%
Internal Materials and Services	512,067	371,366	72.52%
Debt Service	756,000	755,384	99.92%
Contingency	0	0	
TOTAL EXPENDITURES	9,746,889	7,320,785	75.11%

REVENUES	2019-20 Revised Budget	2019-20 Actuals	Percent of Actuals to Revised
Charges for Services	0	10,188	
Intergovernmental	8,721,889	5,494,006	62.99%
Miscellaneous	1,025,000	1,532,022	149.47%
TOTAL REVENUES	9,746,889	7,036,216	72.19%

Expenditure Discussion

Personnel costs were 16% under expended due to the bureau's vacancies, which reached 20% by 6/30. External Materials and Services were under expended due primarily to funds held for unanticipated project costs not being needed, and a slow down in home repair grants in the latter half of the fiscal year as the quarantine impacted program delivery. Internal Materials and Service were under expended due to less indirect cost being charged due to vacancies in program delivery staff.

Revenue Discussion

The CDBG grant is a reimbursement grant, therefore the under collection of Intergovernmental revenue is a result of under expenditures as described below as well as higher than anticipated income (Miscellaneous and Charges for Services) from cash flow loan payments and loan payoffs.

Prior Year Fund Reconciliation Report

Portland Housing Bureau

219 - HOME Grant Fund

EXPENDITURES	2019-20 Revised Budget	2019-20 Actuals	Percent of Actuals to Revised
Personnel	445,818	423,464	94.99%
External Materials and Services	3,298,920	1,416,158	42.93%
TOTAL EXPENDITURES	3,744,738	1,839,621	49.13%

REVENUES	2019-20 Revised Budget	2019-20 Actuals	Percent of Actuals to Revised
Charges for Services	0	593	
Intergovernmental	2,902,938	1,878,205	64.7%
Miscellaneous	841,800	980,472	116.47%
TOTAL REVENUES	3,744,738	2,859,270	76.35%

Expenditure Discussion

External Materials and Services were under expended due primarily to funds held for unanticipated project costs not being needed, and funds belonging to the City of Gresham being under expended.

Revenue Discussion

The HOME grant is a reimbursement grant, therefore the under collection of Intergovernmental revenue is a result of under expenditures as described below as well as higher than anticipated income (Miscellaneous) from cash flow loan payments and loan payoffs.

Prior Year Fund Reconciliation Report

Portland Housing Bureau

221 - Tax Increment Financing Reimbursement Fund

EXPENDITURES	2019-20 Revised Budget	2019-20 Actuals	Percent of Actuals to Revised
Personnel	3,785,880	3,403,499	89.9%
External Materials and Services	40,670,373	30,005,066	73.78%
Internal Materials and Services	1,461,130	1,378,187	94.32%
Capital Outlay	6,713,200	6,712,383	99.99%
Fund Transfers - Expense	749,693	749,693	100%
TOTAL EXPENDITURES	53,380,276	42,248,827	79.15%

REVENUES	2019-20 Revised Budget	2019-20 Actuals	Percent of Actuals to Revised
Charges for Services	1,289,923	914,243	70.88%
Intergovernmental	44,977,159	42,510,014	94.51%
Miscellaneous	5,310,950	5,997,483	112.93%
Fund Transfers - Revenue	170,340	170,340	100%
Beginning Fund Balance	1,631,904	0	0%
TOTAL REVENUES	53,380,276	49,592,080	92.90%

Expenditure Discussion

Personnel costs were 10.1% under expended due to the bureau's vacancies, which reached 20% by 6/30. External Materials and Services were under expended primarily due to lower than anticipated project disbursements in the Interstate, Lents, and North Macadam TIF districts as a result of revised project estimates.

Revenue Discussion

TIF is a reimbursement funding source, therefore the under collection of Intergovernmental revenue is a result of under expenditures as described below as well as higher than anticipated income (Miscellaneous) from cash flow loan payments and loan payoffs. Charges for Services are lower due to reduced rental income from the Westwind Hotel as residents have been relocated.

Prior Year Fund Reconciliation Report

Portland Housing Bureau

225 - Inclusionary Housing Fund

EXPENDITURES	2019-20 Revised Budget	2019-20 Actuals	Percent of Actuals to Revised
Personnel	820,406	839,820	102.37%
External Materials and Services	16,160,641	10,001,116	61.89%
Internal Materials and Services	0	27,876	
TOTAL EXPENDITURES	16,981,047	10,868,812	64.01%

REVENUES	2019-20 Revised Budget	2019-20 Actuals	Percent of Actuals to Revised
Taxes	5,100,000	6,989,877	137.06%
Charges for Services	469,435	794,548	169.26%
Miscellaneous	231,413	1,173,663	507.17%
Fund Transfers - Revenue	653,017	552,317	84.58%
Beginning Fund Balance	10,527,182	0	0%
TOTAL REVENUES	16,981,047	9,510,406	56.01%

Expenditure Discussion

External Materials and Services were under expended due to pre development loans for PDX bond projects being timed differently than originally anticipated. Internal Materials and Services were under expended due to a billing error.

Revenue Discussion

Tax collections were higher than anticipated due to strong construction permit activity in the first half of the fiscal year. Charges for Services were higher due to a fund consolidation for the indirect housing subsidy programs that now collects all charges in one place. Miscellaneous was higher due to a predevelopment loan payoff occurring sooner than anticipated and higher than anticipated interest earnings. Fund transfers were lower due to the fund consolidation for the indirect housing subsidy programs.

Prior Year Fund Reconciliation Report

Portland Housing Bureau

226 - Housing Property Fund

EXPENDITURES	2019-20 Revised Budget	2019-20 Actuals	Percent of Actuals to Revised
Personnel	84,939	79,354	93.42%
External Materials and Services	5,662,395	4,640,047	81.94%
Internal Materials and Services	92,077	95,361	103.57%
Debt Service	712,750	712,750	100%
Contingency	47,044	0	0%
TOTAL EXPENDITURES	6,599,205	5,527,511	83.76%

REVENUES	2019-20 Revised Budget	2019-20 Actuals	Percent of Actuals to Revised
Charges for Services	5,333,629	2,021,666	37.9%
Miscellaneous	40,000	85,992	214.98%
Fund Transfers - Revenue	59,184	59,184	100%
Beginning Fund Balance	1,166,392	0	0%
TOTAL REVENUES	6,599,205	2,166,842	32.83%

Expenditure Discussion

External Materials and Services were lower due to lower than anticipated operating expenditures for the three apartment buildings in this fund.

Revenue Discussion

Charges for Services were lower than anticipated due to the correction of a prior year accounting error to more accurately reflect bank balances for City owned properties. Miscellaneous was over collected due to higher than anticipated interest earnings.

Prior Year Fund Reconciliation Report

Portland Housing Bureau

227 - Recreational Marijuana Tax Fund

EXPENDITURES	2019-20 Revised Budget	2019-20 Actuals	Percent of Actuals to Revised
External Materials and Services	600,000	407,000	67.83%
TOTAL EXPENDITURES	600,000	407,000	67.83%

REVENUES	2019-20 Revised Budget	2019-20 Actuals	Percent of Actuals to Revised
Miscellaneous Fund Allocation	600,000	0	0%
TOTAL REVENUES	600,000	0	0.00%

Expenditure Discussion

External Materials and Services appear under expended due to an advance that does not appear in the report.

Revenue Discussion

Prior Year Fund Reconciliation Report

Portland Housing Bureau

230 - Affordable Housing Development Fund

EXPENDITURES	2019-20 Revised Budget	2019-20 Actuals	Percent of Actuals to Revised
Personnel	993,211	765,360	77.06%
External Materials and Services	169,380	107,595	63.52%
Internal Materials and Services	511,933	472,507	92.3%
Debt Service	2,145,000	621,949	29%
TOTAL EXPENDITURES	3,819,524	1,967,411	51.51%

REVENUES	2019-20 Revised Budget	2019-20 Actuals	Percent of Actuals to Revised
Bond & Note Proceeds	3,819,524	164,205,000	4,299.1%
Miscellaneous	0	284,505	
Fund Transfers - Revenue	0	0	
TOTAL REVENUES	3,819,524	164,489,505	4,306.54%

Expenditure Discussion

Personnel costs were 23% under expended due to the bureau's vacancies, which reached 20% by 6/30, and lower than anticipated staff time on construction coordination and closing activities due to project timelines. External Materials and Services were lower than anticipated due to support costs. Debt Service was lower due to significantly lower than estimated closing costs for the 2020B Housing GO Bonds.

Revenue Discussion

Bond and Note Proceeds and Miscellaneous both reflect the sale of the 2020B Housing GO Bonds.

Prior Year Fund Reconciliation Report

Portland Housing Bureau

404 - Housing Capital Fund

EXPENDITURES	2019-20 Revised Budget	2019-20 Actuals	Percent of Actuals to Revised
Personnel	83,910	-772	-0.92%
External Materials and Services	33,530	1,743	5.2%
Internal Materials and Services	0	-233	
Capital Outlay	19,340	0	0%
TOTAL EXPENDITURES	136,780	739	0.54%

REVENUES	2019-20 Revised Budget	2019-20 Actuals	Percent of Actuals to Revised
Bond & Note Proceeds	0	0	
Miscellaneous	0	12,997	
Beginning Fund Balance	136,780	0	0%
TOTAL REVENUES	136,780	12,997	9.50%

Expenditure Discussion

Variances are due to fund closeout activities.

Revenue Discussion

Variances are due to fund closeout activities.

Capital Program Status Report

Portland Housing Bureau

CIP Program Name	2019-20 Adopted Budget	2019-20 Revised Budget	2019-20 Actuals	PY Variance	PY Percent of Actuals to Revised	2020-21 Adopted Budget	2020-21 FALL Requested Total	2020-21 July Actuals	Fall Req. to Adopted Variance	Fall Req. to Adopted % Variance
Acquisitions	1,180,000	916,780	55,337	-861,443	6.04%	0	170,000	1,816.61	170,000	100%
	13,037,971	7,494,896	7,642,223	147,327	101.97%	10,367,209	12,467,209	1,695,340.4	2,100,000	16.84%
Sum:	14,217,971	8,411,676	7,697,560	-714,116	-8.49%	10,367,209	12,637,209		2,270,000	17.96%

Prior Year Variance Description

Variances for the Powell, Prescott, and East Burnside acquisitions reflect the close out activities in FY 2019-20 for these three properties; East Burnside now an operating apartment property, and Prescott and Powell soon to be developed with PDX Bond funds. Variances for the Joyce and Westwind reflect holding costs for the buildings, with the under expenditure for the Westwind reflecting the delayed billing of tenant relocation costs.

Current Year Variance Description

Because of the delayed billing noted above, PHB is rebudgeting funds for Westwind tenant relocation costs.

Capital Program Status Report

Portland Housing Bureau

CIP Program Name	Project	2019-20 Adopted Budget	2019-20 Revised Budget	2019-20 Actuals	PY Variance	PY Percent of Actuals to Revised	2020-21 Adopted Budget	2020-21 FALL Requested Total	2020-21 July Actuals
Acquisitions	H30288	0	108,530	3,639	-104,891	3.35%	0	0	0
Acquisitions	H30289	500,000	100,000	10,558	-89,442	10.56%	0	0	1,816.61
Acquisitions	H30470	680,000	680,000	41,672	-638,328	6.13%	0	170,000	0
Acquisitions	H30500	0	24,600	-533	-25,133	-2.17%	0	0	0
Acquisitions	H30502	0	3,650	0	-3,650		0	0	0
	H30010	0	0	37,916	37,916		0	0	2,338.05
	H30286	0	1,139,026	1,300,331	161,305	114.16%	2,000,000	4,000,000	55,923.29
	H30287	0	0	363	363		0	0	0
	H30301	0	0	760	760		0	0	0
	H30310	94,701	94,701	93,333	-1,368	98.56%	0	0	103.86
	H30314	0	0	5,635	5,635		0	0	155.1
	H30319	0	0	0	0		0	0	0
	H30321	7,113,000	2,700,000	2,700,280	280	100.01%	7,774,344	7,774,344	1,758,857.51
	H30329	92,865	0	2,462	2,462		92,865	92,865	0
	H30415	1,380,000	2,800,000	2,823,943	23,943	100.86%	500,000	500,000	-122,741
	H30466	1,557,405	0	691	691		0	0	0
	H30467	0	0	5,276	5,276		0	0	0
	H30474	0	0	-4	-4		0	0	0

Capital Program Status Report

Fall Req. to Adopted Variance	Fall Req. to Adopted % Variance
0	#DIV/0
0	#DIV/0
170,000	100%
0	#DIV/0
0	#DIV/0
0	#DIV/0
2,000,000	50%
0	#DIV/0
0	#DIV/0
0	#DIV/0
0	#DIV/0
0	#DIV/0
0	0%
0	0%
0	0%
0	#DIV/0
0	#DIV/0
0	#DIV/0

Capital Program Status Report

H30501	2,800,000	0	0	0		0	0	0
H89050	0	761,169	671,238	-89,931	88.19%	0	100,000	703.59
Sum:	14,217,971	8,411,676	7,697,560	-714,116	-8.49%	10,367,209	12,637,209	1,697,157.01

Prior Year Variance Description

Variations for the Powell, Prescott, and East Burnside acquisitions reflect the close out activities in FY 2019-20 for these three properties; East Burnside now an operating apar

Current Year Variance Description

Because of the delayed billing noted above, PHB is rebudgeting funds for Westwind tenant relocation costs.

Capital Program Status Report

0	#DIV/0
100,000	100%
2,270,000	17.96%

Capital Program Status Report

Responsible Bureau	CIP Program Name	Project	2019-20 Adopted Budget	2019-20 Revised Budget	2019-20 Actuals	PY Variance	PY Percent of Actuals to Revised	2020-21 Adopted Budget	R
HC	Acquisitions	H30288	0	108,530	3,639	-104,891	3.35%	0	
HC	Acquisitions	H30289	500,000	100,000	10,558	-89,442	10.56%	0	
HC	Acquisitions	H30470	680,000	680,000	41,672	-638,328	6.13%	0	
HC	Acquisitions	H30500	0	24,600	-533	-25,133	-2.17%	0	
HC	Acquisitions	H30502	0	3,650	0	-3,650		0	
HC		H30010	0	0	37,916	37,916		0	
HC		H30286	0	1,139,026	1,300,331	161,305	114.16%	2,000,000	
HC		H30287	0	0	363	363		0	
HC		H30301	0	0	760	760		0	
HC		H30310	94,701	94,701	93,333	-1,368	98.56%	0	
HC		H30314	0	0	5,635	5,635		0	
HC		H30319	0	0	0	0		0	
HC		H30321	7,113,000	2,700,000	2,700,280	280	100.01%	7,774,344	
HC		H30329	92,865	0	2,462	2,462		92,865	
HC		H30415	1,380,000	2,800,000	2,823,943	23,943	100.86%	500,000	
HC		H30466	1,557,405	0	691	691		0	
HC		H30467	0	0	5,276	5,276		0	
HC		H30474	0	0	-4	-4		0	
HC		H30501	2,800,000	0	0	0		0	
HC		H89050	0	761,169	671,238	-89,931	88.19%	0	
Sum:			14,217,971	8,411,676	7,697,560	-714,116	-8.49%	10,367,209	

Capital Program Status Report

2020-21 FALL Requested Total	2020-21 July Actuals	Fall Req. to Adopted Variance	Fall Req. to Adopted % Variance
0	0	0	#DIV/0
0	1,816.61	0	#DIV/0
170,000	0	170,000	100%
0	0	0	#DIV/0
0	0	0	#DIV/0
0	2,338.05	0	#DIV/0
4,000,000	55,923.29	2,000,000	50%
0	0	0	#DIV/0
0	0	0	#DIV/0
0	103.86	0	#DIV/0
0	155.1	0	#DIV/0
0	0	0	#DIV/0
7,774,344	1,758,857.51	0	0%
92,865	0	0	0%
500,000	-122,741	0	0%
0	0	0	#DIV/0
0	0	0	#DIV/0
0	0	0	#DIV/0
0	0	0	#DIV/0
100,000	703.59	100,000	100%
12,637,209	1,697,157.01	2,270,000	17.96%