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

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**PHB RELOCATION POLICY AND PROCEDURES**  
**Non-Federal Funds – Rental Projects**

**PHILOSOPHY STATEMENT**

It is the philosophy of the City of Portland's Housing Bureau (PHB) to treat all tenants affected by projects receiving PHB funding, in a supportive, respectful and equitable manner. The PHB supports giving each tenant an opportunity to take an active role in the process through regular meetings and printed material. It is the PHB's goal not only through this policy, but in its Strategic Plan and equity agenda to ensure the fair treatment of tenants at all times.

**POLICY**

The PHB policy is to avoid displacement where possible and to ensure that assistance is provided when moves are unavoidable. Relocation should be planned as far in advance as possible. The PHB achieves this policy by:

- Reviewing applications for funding and their potential impact to current residents.
- Giving advance notice and relocation assistance to residents who are required to move as a result of a City assisted rehabilitation or housing development project.
- Giving serious consideration to the needs of relocated tenants which include, but are not limited to, the proximity of daycare providers, school districts, transportation type and availability, medical providers, and grocery stores.
- Frequently updating and communicating with affected tenants. A process for questions, comments, and appeals will be established by the project sponsor and submitted to the PHB. Tenants may contact the PHB with any concerns they may have.

**PROCEDURES**

**1.0 Funding Source** PHB non-Federal funds (including but not limited to Tax Increment Financing) will be guided by this policy. This policy and procedures apply to the temporary (one year or less) or permanent displacement (displacement lasting more than one year or requirement to move permanently) of residential tenants as a result of non-Federal funding provided by the Portland Housing Bureau to an outside agency/borrower for the construction, rehabilitation, conversion and/or demolition of residential properties.

**2.0 Applications** Applications for funding must include a relocation plan, a rent roll, and a preliminary budget if applicable. A relocation plan must address the type of potential relocation (temporary and/or permanent) and an estimate of the duration. The relocation plan must also state that all reasonable steps to minimize displacement as a result of the project are taken. If feasible, the borrower shall consider carrying out a project in stages to minimize tenant displacement when feasible.

Tenants may not be required to move-out in anticipation of a project to avoid paying relocation costs. If it becomes known that this was attempted, it may be determined that the project does not qualify for the financing it seeks. Upon request by PHB, move-out paperwork shall be made available by the agency/borrower for any tenant who has moved out two months prior to the application date.

**3.0 Notices** Notices advising tenants of an impending project must be delivered by the agency/borrower after agency/borrower receives an award letter. These notices must be provided in draft to the Portland Housing Bureau prior to issuance for approval.

Notices must:

- Be submitted with application in draft form for review to allow timely distribution upon the event of a Notice of Award.
- Disclose that non-federal financial assistance is being provided by the Portland Housing Bureau.
- Advise tenants that if they move outside of the relocation process they will lose their eligibility for relocation assistance;
- Provide an overview of the project;
- Inform tenant that rent may be increased during the first year of project's completion (receipt of a Notice of Completion and/or Certificate of Occupancy) only with six months notice. New monthly rents and established utility costs may not exceed 30% of monthly gross income. **(Section 8 program rents are not subject to this requirement);**
- Give information regarding upcoming timelines cautioning that timelines are subject to change.
- Be on letterhead with contact information for inquiries as well as PHB contact information for concerns tenants may have;
- Be signed by the tenant and kept by the borrower for three years.
- Be sent certified mail, return receipt requested if tenant refuses to sign. Receipts must be kept for three years.

**Temporary Relocation** If temporary relocation is necessary, a notice containing the details of the move including the duration and location must be given to tenants by the agency/borrower as soon as possible. Notice will inform tenants that they will not be re-screened for criminal background, but may be requested to provide income verification information. All notices and relocation paperwork must be signed by the tenant.

**Permanent Displacement** The agency/borrower must provide the household with a written notice 60 days prior to a permanent displacement when a tenant(s) are permanently displaced for the project (required to move for one year or longer). The tenant must be offered comparable housing which is similar to the unit from which they are moving. This unit must be decent, safe and sanitary per Section 8 HQS standards, and described in the 60 day notice and be available at the time of the offer. Tenant may decline the offer and choose their own replacement unit. However, compensation will not change from that of the original offer.

**Additional Notice Requirements for Permanent Displacement** Notice of a permanent move must provide:

- A move out date
- The address of the offered replacement unit

- Offer of transportation and assistance in viewing the unit
- A meeting time with the prospective manager
- Offer of no cost moving services including packing
- Offer of assistance in setting up utility service, removing trash, cleaning assistance, etc., at no cost.
- Description of compensation requirements including method of payment and notice that if and when tenant moves from the replacement unit, relocation assistance will cease
- Statement that tenant may secure their own housing replacement unit within the 60 day notice time frame and inform tenant(s) that compensation is limited to their original offer.
- Appeal rights to PHB for those who have issues they believe are not being addressed by management.

### **3.1 Compensation**

**Temporary Displacement** If temporary relocation is necessary, the agency/borrower must pay moving expenses to and from the temporary unit including moving supplies, packing/unpacking assistance and any increased housing costs which may include transportation, meal vouchers and utility/service connection fees. The unit must be similar to the unit from which they are moving and must be decent, safe and sanitary per Section 8 HQS standards. Every effort must be made to return the tenant to a substantially similar unit in the building/complex with a limit on rent increase as stated above in Section 3.0 Notices.

The relocated tenant must comply with the terms of their current lease. If any tenant elects to move from the temporary unit without making previously approved arrangements with the borrower or their agent, they shall no longer be considered eligible for temporary relocation costs but will have the option to return to their rehabbed unit upon completion.

**Permanent Displacement** A tenant will receive the difference, if any, in increased rent between their displaced unit and their new unit including the cost of utilities. This difference will be based on a 24 month calculation with a limit not to exceed \$5,250. The borrower may use their discretion regarding how the compensation will be paid (i.e., periodic installments, monthly, etc.) but must inform the tenant of the method. A borrower may advance a portion of the payment to assist tenant(s) with the cost of deposits, application fees, etc.

The household may refuse the offered unit and chose to find their own; however, the amount of compensation will remain unchanged using the rent and utility figures from the original calculation. In order to receive the compensation, the replacement unit must be decent, safe and sanitary per Section 8 HQS standards and the agency/borrower must confirm that the tenant has secured the unit prior to making any payments. If the tenant chooses to move from the unit they have relocated to, their eligibility will cease and no further payments will be made.

**3.2 Inconvenience Compensation** In projects where the scope of work requires tenants to be out of their units for less than a full day or the inconvenience of the construction is particularly onerous on the residents, the borrower shall provide options at no cost to tenants. Some of these options may include transportation and/or meal vouchers, movie passes, etc. The borrower will communicate these options and method of payment to the residents with a written notice.

**4.0 DOCUMENTATION AND RECORD RETENTION** Copies of all relocation documents including copies of notices, correspondence, proof of payments made to tenants for relocation expenses, and/or compensation shall be provided to the PHB upon request as stated in the regulatory agreement.