

APPENDIX G

EQUITY PLAN

Introduction:

PHB is dedicated to advancing equity by among other things increasing housing and economic opportunities for low-income residents of Portland and creating business opportunities for State of Oregon certified Minority, Women and Emerging Small Business enterprises (“M/W/ESB”).

Below are possible Equity Plan Components. Development teams are encouraged to tailor their Equity Plan (EP) to suit their project and development team members.

Plan Components:

- 1) Discussion of the roles and responsibilities of the development team and its members as those relate to the specific housing needs in the community, including who has access to the housing opportunities to be created by this project:
 - How the proposal and its implementation will counter issues of gentrification and displacement in the community
 - Partnerships already in existence or proposed for providing, improving or increasing access. Include any documentation of support from such partnerships (e.g. Memorandum of Understanding, Letters of Support and/or Partnership Agreements)
 - Approaches to marketing, screening criteria, appeal process and lease-up in operations that increase or improve access.
 - Strategies and/or outreach activities for property management services and other vendors, which are responsive to this community (e.g. professional services, laundry, maintenance, landscaping)
 - Resident services and resident services programming including staffing or contracting with outside providers, which are responsive to this community.

- 2) Discussion on how the development team will create community economic opportunities. Include in the response information related to Minority, Women, and Emerging Small Business Contracting, Workforce Training and Hiring, Professional Services and Commercial Space::
 - A. **Minority, Women, and Emerging Small Business Contracting**
 - Discussion on how the team intends to meet or exceed the contracting policies and goals, as established by the Portland Housing Bureau
 - Approach and methodology for identifying subcontracting opportunities (including suppliers, manufacturers and services).
 - Outreach to inform contractors of opportunities, schedules, solicitations, etc.
 - Any mentoring, technical or bonding assistance to be made available to M/W/ESB subcontractors.

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- Any financial assistance, including bonding, prompt pay and/or other forms of financial assistance that increases M/W/ESB subcontractor's capacity and capability for maximum participation.
- Name, experience and qualifications of the personnel assigned to and responsible for the successful development and implementation of the Development Benefits Plan.

B. Workforce Training and Hiring

- Strategies/methods for meeting workforce policies and goals, as established by the Portland Housing Bureau
- Description of general contractor's workforce demographics and any measurable steps taken to ensure a diverse workforce (e.g., women and people of color).
- Approach to increase on-the-job training, mentoring, technical training, and/or professional opportunities for women and people of color.
- Approach(es) to encourage the involvement of the community through employment opportunities, including the use of state-approved pre-apprenticeship programs.

C. Professional Services

PHB does not have formal policies for equity in professional services, however, the Bureau encourages outreach to M/W/ESB professional services firms with a goal of at least 20% participation.

- Outreach activities for soft cost and pre-development services anticipated for the project including professional trades, especially minority and women-owned firms, (e.g. architecture, engineering, geotechnical, project and financial consulting, legal, accounting, etc.)
- Estimated target and/or any goal setting for professional trades involved in the project.
- M/W/ESB firms already part of or partnering with development team

3) Commercial Space Opportunities

Where applicable, ground-floor commercial space should support neighborhood business growth and provide needed goods and services to the community (scale and size of the commercial space will be determined in partnership with the selected development team). Development teams may want to provide information on any potential tenants already identified and/or discuss their approach and methodology for outreach and identifying potential tenants. Responses may include how any commercial tenants may be a benefit to residents of the housing development and/or the surrounding community.