

Business Operations

Program Description & Goals

The Business Operations program includes Administrative Services, Finance & Accounting, Risk Analysis and Compliance, Human Resources and Contract Support. These activities ensure that the Bureau service delivery programs have adequate support to carry out their functions in the most efficient and effective means possible. Goals include:

- Ensuring that administrative functions are delivered consistently, reliably, and effectively;
- Providing strong finance, accounting and loan servicing functions;
- Delivering excellence in compliance;
- Supporting the bureau's equity goals through internal business practices, hiring, training and contract goals;
- Ensuring timely, confidential, and supportive human resource services;
- Supporting PHB's advisory and oversight committees including the Portland Housing Advisory Commission, Fair Housing Advocacy Committee, N/NE Neighborhood Housing Strategy Oversight Committee, Bond Oversight Committee and the Rental Services Commission.

Performance goals for the Business Operations program are focused on improving customer service relationships and managing administrative costs. The administrative costs metric below shows variability from year to year. This is because, although PHB's administrative costs remain relatively stable, there is significant variability in overall bureau expenditures from year to year due predominantly to the limited predictability of affordable housing project development cycles.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Administrative costs as a percentage of bureau level budget	5%	5%	5%	5%	5%
Administrative costs as a rolling three-year average	7%	7%	7%	7%	7%

Explanation of Services

The Finance and Accounting activity provides payment services in coordination with the Office of Management and Finance (OMF) for all program expenditures, including contract payments and loan disbursements; manages the bureau's portfolio of approximately 1,800 loans, managing billings, receiving payments, and tracking deferred payment loans; budgets and monitors over three dozen funds with numerous statutory and policy restrictions; and provides financial reporting on Bureau funds in accordance with City, State, Federal, GASB and GAAP standards.

The Risk Analysis and Compliance (RAC) activity monitors City, State, and Federal compliance by bureau funding partners to protect the City's investment in affordability for low-income families and individuals; provides risk analysis on the financial viability of the housing portfolio for long-term sustainability; monitors regulatory agreements that define rent levels based on tenant's incomes for the next 60 or 99 years, ensuring safe and stable affordable housing for thousands of low-income

families and individuals; and monitors prevailing wages on bureau financed construction projects.

The Human Resources activity assists with recruitment and retention of Bureau staff in support of bureau managers. This includes timekeeping, managing the recruitment pipeline (including several classifications unique to the Bureau), organizing and scheduling interview panels, onboarding, FMLA coordination, and other employee-related issues as needed.

The Contract Support activity includes the tracking of bureau contracts from initiation to final approval by the City Clerk's Office; providing expertise to Bureau staff in navigating the City contracting process; managing the sub-recipient contractor monitoring process; managing RFP and RFI processes; and supporting the Finance and Accounting team with requisitions.

Equity Impacts

Within the Business Operations program, equity is a key value in how services are rendered. PHB utilizes MWESB firms for everything from trainings to food for community meetings and facilitation services. The contract specialist ensures that equity goals and standards are consistent across all sub-recipient contracts and adheres to the City's requirements for RFPs and Goods and Services Contracts. The RAC team tracks residents of regulated units by race, income and family size, which assists the bureau overall in planning for additional units and marketing strategies with community partners.

The HR team ensures that PHB's recruitment and hiring practices are equitable and seeks to hire staff that reflect the communities we serve. Since 2012 the bureau has increased diversity of the staff by nearly 30%; women make up over 70% of the workforce. Additionally, with recent promotions the leadership team is now comprised of 54% people of color and 72% women. This team also develops and tracks the Affirmative Action Goals and Equity roadmap goals for hiring, retention and training of bureau staff.

Changes to Program

A bureau reorganization in late FY 2017-18 brought the RAC team back to Business Operations, leading to increased collaboration between the loan servicing function and housing portfolio risk analysis. This collaboration continues as the two teams formalize the collection of cash flow loan payments due from financed projects. Continued complexity in Bureau financial transactions and potential increased volume of those complex transactions due to the Metro Bond funding will need to be monitored in terms of staffing capacity.

Changes have been made in response to additional compliance work, which has and will continue to grow.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted	
Bureau Expense					
External Materials and Services	1,057,798	1,553,312	1,173,400	2,000,933	
Internal Materials and Services	1,479,922	3,279,793	1,534,863	1,351,295	
Personnel	2,181,294	2,544,553	2,615,441	2,865,032	
Fund Expense					
Contingency	0	0	8,000	25,897	
Debt Service	620,894	30,844	0	0	
Fund Transfers - Expense	1,935,612	1,087,880	1,402,764	1,022,518	
Sum:	7,275,520	8,496,381	6,734,468	7,265,675	
	FTE	21	23.18	23	22.9

Resources: The Business Operations program is funded by many of the Bureau's funding sources, including the many flavors of TIF, federal grants, the HIF, and the General Fund.

Expenses: Program expenses are nearly evenly split between staff costs and bureau operating costs (rent, computer systems maintenance, and inter agencies). Staffing costs are charged to the funding sources noted above – approximately 45% TIF, 15% HIF and General Fund, 25% federal funds, and 15% to the Bond and Building funds. Bureau operating costs are collected in the General Fund but are offset approximately 75% to indirect allocations to other funding sources.

Staffing: The Business Operations program consists of three teams, one contract specialist, and the Business Operations Manager. The Administrative Services team has 5.0 FTE, Finance and Accounting has 9.00 FTE, and the RAC team has 6.95 FTE.

Assets and Liabilities: The Business Operations program has several bureau software systems recorded as assets, most notably the Housing Development Software (HDS) system. HDS is critical to managing and tracking the bureau loan portfolio, as well as tracking compliance for the portfolio of housing projects the Bureau has financed.

Program Information

Bureau: Portland Housing Bureau

Program Contact: Leslie Goodlow

Website: [https://www.portlandoregon.gov/
phb/72621](https://www.portlandoregon.gov/phb/72621)

Contact Phone 503-823-4160

Data Analytics and Systems

Program Description & Goals

The Data Analytics & Systems team plays a key role in achieving outcomes for affordable housing services and providing stable, affordable, and equitably available housing in Portland. The team uses data driven insights to improve outcomes for affordable housing development and preservation; homeownership and home repair; homeless services; and programs available to renters and landlords. For each bureau program the team works to ensure that data is available, can be analyzed, and aligns with stated policy goals and objectives. Data analytic projects are assessed for their possible outcomes as well as their usefulness to policy makers and the public. All Data Analytics & Systems Team projects have the potential for replication and use in different operational areas inside the bureau or elsewhere in the City. The goal of the team is to produce operational change within the bureau and its programs through the use of research and analysis. This is a new program offer that does not currently have program-specific performance measures.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
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Explanation of Services

In the past three years the City has significantly expanded funding and programming along the housing continuum. The Housing Bureau’s Data Analytics & Systems Team uses data driven insights to improve the Housing Bureau’s programs and policies. The team evaluates the short and long-term impacts of policy changes on housing needs, equity, and Portland’s affordable housing market. The team supports and administers the Housing Bureau’s data infrastructure and assesses program performance against targets. The team publishes quarterly housing market reports and forecasts, an annual State of Housing report, data visualizations and maps, longitudinal studies, survey development, and provides qualitative and quantitative analysis. The team regularly responds to requests for information from the public, City bureaus, and elected officials.

Data management practices at PHB range from basic to advanced. While PHB datasets are available with metadata on the City’s Open Data portal and Portland Maps, some datasets exist in stand-alone systems and are integrated in an ad hoc manner. Data is collected on a quarterly basis if not more frequently and the percentage of missing data is low. Privacy protection is a high priority of the bureau and is performed using an approval process that allows limited PII data to be used for approved projects. Leadership at the bureau and City Council report using PHB research and data analytics products to make policy decisions.

Equity Impacts

The Data Analytics and Systems team recognizes that data and analysis can be powerful tools for distilling vast and disparate data and overcoming obstacles, but it can also inadvertently reproduce biases and inequities. The team works to maintain transparency and incorporate inclusive analytics practices into its work. Datasets with metadata are made available to the public and the team engages in regular reporting to different community groups and stakeholders that are impacted by our work.

Changes to Program

For PHB's new programs and policies, efforts are underway to standardize systemwide data collection and increase analytical capacity to better interpret service outcomes. In the near-term the team is working to revamp how data for the Rental Services and Development Incentives programs is collected and reported to more accurately identify if outcomes are meeting their intended policy goals. In FY 2019-20 the team will be conduct a systems assessment and plan to determine if the bureau's systems needs are being met through its current software and data infrastructure. This work will include exploring a commercial off-the-shelf (COTS) system for data gathering and compliance for the City's Residential Rental Registration program.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	234,050
Personnel	0	0	0	1,044,671
Sum:	0	0	0	1,278,721
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FTE	0	0	0	8.17

Resources: The Data Analytics & Systems Team is funded by a variety of sources within the bureau. Staffing is charged to the same sources as the Policy, Business Operations, and Director's Office programs; TIF, federal grants, the HIF, and the General Fund - reflecting the broad support function the team provides to bureau programs.

Expenses: Program expenses are staffing costs. Annual expenses for data system hosting and maintenance are reflected in the Business Operations program to reflect the bureau-wide usage of many of these systems.

Staffing: Staffing for this program consists of 8.17 FTE. This team collaborates with other bureau staff and service providers in developing data analysis products.

Assets and Liabilities: N/A

Program Information

Bureau: Portland Housing Bureau

Program Contact: Antoinette Pietka

Website: <https://www.portlandoregon.gov/phb/76186>

Contact Phone 503-823-2394

Director's Office

Program Description & Goals

The Director’s Office works across all sections of the Housing Bureau to ensure the bureau’s strategic initiatives are effective, equitable and responsive to community perspectives and need. The Director’s Office is responsible for oversight across all bureau programs and services; engaging the public in bureau initiatives; fostering and maintaining partnerships within the community; ensuring the bureau works as efficiently as possible; and is transparent and accountable to the public. The Director’s Office is responsible for strategic and policy direction, as well as, Equity and Inclusion, Communications, and Community Engagement. There are no program-specific performance measures associated with this program, but goals are focused on fostering collaborative relationships with the community and organizations, using a data-driven equity approach to bureau policy and decision making, and improving methods of communication and engagement.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
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Explanation of Services

The Director’s Office program exists for many important reasons. The office provides long-range vision and overall direction for Portland's affordable housing investments and strategic initiatives. Moreover, the Director’s office advances bureau goals, strategies, and investment priorities with a focus on advancing the bureau’s equity agenda.

The Director’s Office addresses the broad scope of responsibilities by collaboratively working with a wide range of partners to meet the housing needs of the people of Portland. The office has an important role in ensuring that future policy and implementation decisions of the bureau improve housing access and economic opportunities for traditionally under-served populations. The office works to secure sustainable resources for the ongoing creation and preservation of affordable housing, as well as, ensure internal capacity exists to deliver quality service during the bureau’s continuing growth and change. It also serves to support and leverage the guidance of the Portland Housing Advisory Commission, N/NE Neighborhood Strategy Oversight Committee, Bond Oversight Committee, Rental Services Commission, and Fair Housing Advocacy Committee - implementing their recommendations as appropriate.

Equity Impacts

PHB has a well-documented history of supporting equity and inclusion in contracting. Since its inception, the Bureau has met or exceed the City of Portland’s goal of 20% Disadvantaged, Minority, Women and Emerging Small Business (DMWESB) for construction sub-contracts. In July of 2016, PHB committed to a goal of 30% DMWESB participation by the year 2021 by implementing annual 2% target increases for all multi-family funded projects. Through a concerted outreach effort, the Bureau also has supported workforce training and hiring goals.

Since 2012 the bureau has increased diversity of the staff by nearly 30%, and women make up over 70% of the workforce. Additionally, with recent promotions the leadership team is now comprised of 54% people of color and 72% women. This team also develops and tracks the Affirmative Action

Goals and Equity roadmap goals for hiring, retention and training of bureau staff.

Changes to Program

The Director's Office is heavily impacted by changes in housing policy. As the need for affordable housing and homelessness relief continues, the Housing Bureau will continue to see growth. In response to the growing responsibilities of the Housing Bureau, the Director's Office will include the shifting of a position from Business Operations to provide an Executive Assistant to support the administrative and scheduling needs of the Director (the Director has not had dedicated administrative support in the past). In addition, to meet the growing need to communicate proactively and strengthen its engagement with the public the Director's Office will include a Public Information Manager position funded within existing resources.

Voters approved Oregon Measure 102 to amend the state Constitution to allow more flexibility in the use of bond funds for affordable housing initiatives. This amendment changes the business of PHB since the Bond passed in 2016, in which PHB was prohibited from spending bond funds on any development that was not owned and operated by the city. Now, PHB can lend bond dollars to private parties to fund affordable housing projects, resulting in more affordable units. The Director's Office is heavily involved in planning for and implementing bond projects, and the long-term business plan of PHB.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	45,831	26,980	29,000	31,000
Internal Materials and Services	1,025	60	0	0
Personnel	483,411	506,616	774,576	1,170,416
Ending Fund Balance	22,030,909	23,868,510	0	0
Sum:	22,561,176	24,402,166	803,576	1,201,416
FTE	3	2	5	8

Resources: This program is funded by a mix of resources; over 40% from Tax Increment Financing resources, with the remaining portions split somewhat evenly among federal grants, the GO Bond, and other local sources. The small amount of external materials and services is likewise spread among the same sources by means of the bureau's internal cost recovery model.

Expenses: Program expenses consist primarily of the costs for seven positions and a small amount of material and services.

Staffing: Staffing funded within the program (8.0 FTE) include the Director, Assistant Director, the Equity and Inclusion Manager the Public Information Manager and Officer, the Public Outreach coordinator; and an Executive Assistant.

Assets and Liabilities: N/A

Program Information

Bureau: Portland Housing Bureau

Program Contact: Shannon Callahan

Website: <https://www.portlandoregon.gov/phb/>

Contact Phone 503-823-2289

Policy and Planning

Program Description & Goals

The PHB Policy and Planning program staff are responsible for the policy and planning functions of the Bureau. The work of this program is dynamic and includes implementation of community and city plans for new initiatives, policy frameworks for program implementation, policy research and recommendations, city code and administrative rules, Memo of Understanding (MOU)/ Intergovernmental Agreement (IGA) development and implementation, oversight and advisory body staff work. The work of the policy and planning staff is directed by the PHB Director, Commissioner-in-Charge, and City Council.

There are no program-specific performance measures associated with this program, but goals include increased resources to meet and exceed the city’s affordable housing goals, the implementation of national housing policy best practices, the structure of programs to meet the changing needs of low-income Portland households, development and implementation of plans and programs based on the direction of City Council, the administrative of code and administrative rules based on direction from City Council.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
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Explanation of Services

Affordable housing and homelessness are priority issues for Portlanders and City Council. To address these issues, the city has many new and ongoing initiatives requiring policy and planning work. This program funds staff who each are assigned a portfolio of policy and planning issues. Many initiatives are consistent year-to-year, but as new initiatives are identified by City Council, the Commissioner-in-charge, or the bureau, they are assigned based on workload and expertise.

In recent fiscal years the products of this program include: the Portland Housing Bond policy framework, Joint Office of Homeless Services IGA management, the Permanent Supportive Housing 2,000 unit plan, N/NE Housing Strategy development and implementation, the N/NE Preference Policy development and implementation, mandatory relocation assistance code and administrative rules development, Inclusionary Housing program development, construction excise tax (CET) program development, affordable housing land use bonuses and incentives, the SW Corridor Equitable Housing Strategy, the Broadway Corridor planning.

Equity Impacts

The work products of the policy and planning program offer direct bureau programs, spending, and rules/code, and as a result have a substantial impact on racial equity. The policy and planning staff regularly involve Communities of Color, low-income communities, and historically marginalized communities in planning and decision-making processes, to the extent possible, and produce work products that actualize racial equity.

Changes to Program

The Bureau is moving ongoing General Fund resources within the 1% constraint to this program for the development. In the current fiscal year workload and deliverables have expanded to include plans and policies associated with permanent supportive housing, the metro affordable housing bond, Broadway and Southwest corridors, and other planning work. The bureau anticipates continued work in these areas next fiscal year, in addition to new planning work, but the new deliverables can likely be absorbed with current resources.

In addition, the Bureau is adding a limited term Housing Program Coordinator position to analyze and assist with the housing concepts and studies initiated by bureau partners. The position is funded by existing resources due to the broad range of these initiatives.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	150,083	77,013	380,693	587,840
Internal Materials and Services	1,115	313	0	269
Personnel	417,477	798,209	1,597,887	788,135
Sum:	568,675	875,535	1,978,580	1,376,244
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FTE	3.92	6.74	12.64	6.29

Resources: The Policy and Planning Team is funded by a variety of sources within the Bureau. Staffing is charged to the same sources as the Business Operations, Data Analytics and Systems, and Director's Office programs; TIF, federal grants, the HIF, and the General Fund.

Expenses: Program expenses are primarily salaries and benefits for policy and planning staff, as well as materials and services for consulting, meeting space and materials, printing and distribution, etc.

Staffing: This program includes 6.29 FTE. Staff are assigned a portfolio of policy and planning issues (see explanation of services section) and are responsible for the associated work products.

Assets and Liabilities: N/A

Program Information

Bureau: Portland Housing Bureau

Program Contact: Matthew Tschabold

Website: <https://www.portlandoregon.gov/phb/26428>

Contact Phone (503) 823-1854

JOHS Administration and Operations

Program Description & Goals

The City makes significant investments in programs and community initiatives to prevent and ultimately end homelessness for tens of thousands of individuals and families each year. In FY 2017, the City of Portland and the County consolidated resources and services under the City and County Joint Office of Homeless Services (JOHS), guided by the shared values and common agenda of the A Home for Everyone (AHFE) partners, and a commitment to maximizing the benefits of local public investments. The JOHS is the backbone agency supporting a collective impact approach to preventing and ending homelessness in the City of Portland and Multnomah County. See other program offers for performance measures.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
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Explanation of Services

Homelessness is an ongoing crisis in the City of Portland and Multnomah County. In the last several years, our community has come together and responded in unprecedented ways. The JOHS represents a shared commitment between the City of Portland and Multnomah County to expand, improve, and simplify access to the range of services needed to address homelessness in our community.

Created by a July 2016 intergovernmental agreement between the City of Portland and Multnomah County, JOHS administers contracts for homeless services, plans and manages systems of care, oversees system reporting and evaluation, conducts homeless street counts and one night shelter counts, and writes proposals to and monitors funds issued by the U.S. Department of Housing and Urban Development’s Continuum of Care program. These operations affect the lives of tens of thousands of homeless singles, youth, and families, as well as survivors of domestic violence in Portland and Multnomah County.

Through the JOHS, funds are contracted to more than 40 nonprofit and public agencies to provide a comprehensive range of services to assist people experiencing homelessness or housing instability. The JOHS receives funding and policy direction from the City of Portland and Multnomah County, and policy guidance from A Home for Everyone (AHFE), our regional ending homelessness initiative, as well as the City of Gresham and Home Forward. The JOHS, by integrating staffing and funding, offers the City and County enhanced operational coordination and effectiveness in the delivery of homeless services.

Equity Impacts

The JOHS is committed to and has taken numerous steps to realize the AHFE goal of achieving racial equity in homeless services and eliminating disparate rates of homelessness on the basis of race and ethnicity. To that end, the JOHS has: (1) improved data collection and outcome reporting using inclusive racial identities; (2) created standards of practice for all contractors that include cultural responsiveness and/or culturally specific service provision; (3) included a requirement for organizational equity assessments, plans, and progress reporting in all contracts; (4) prioritized and increased funding to culturally specific organizations through local procurement processes and prioritization of culturally specific programs in competitive federal applications; and (5) prioritized staff support to the AHFE Equity Committee, the local launch of a national initiative to address the

role of racism in causing and perpetuating homelessness (“Supporting Partnerships for Anti-Racist Communities”), and the implementation of the AHFE equity lens in all AHFE planning efforts (including most recently around planning for chronic homelessness and permanent supportive housing). The JOHS is further increasing its internal capacity to support racial equity work through the recent hire of an Equity Manager, who will lead the JOHS’ racial equity efforts with AHFE and our contractors, and the development and implementation of both the County’s and an office-specific workforce equity plan.

Changes to Program

In FY 2018-19, \$1.25 million was budgeted as one-time-only funding for Emergency Shelter strategic capital improvements.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	151,168	45,200	1,250,000	645,135
Internal Materials and Services	-34	0	0	0
Personnel	-168	0	0	0
Sum:	150,966	45,200	1,250,000	645,135

Resources: The City’s proposed contribution to the JOHS budget includes City General Fund and two federal grants (1) Emergency Solutions Grant (ESG) and (2) Housing Opportunities for Persons with AIDS (HOPWA).

Expenses: City funds are pass thru payments to JOHS and are used to support office staffing and service charges for facilities, information technology, distribution and records, and materials and supplies for office operations. City funds are passed through to the JOHS. The total JOHS budget is represented in the Multnomah County budget where the office is hosted. For more information, please see the Multnomah County JOHS budget.

Staffing: For specific FTE detail, please see the Multnomah County JOHS Budget.

Assets and Liabilities: Not applicable.

Program Information

Bureau: Portland Housing Bureau

Program Contact: Marc Jolin

Website: multco.us/joint-office-homeless-services

Contact Phone 503-988-5531

JOHS Employment Services

Program Description & Goals

A Home for Everyone (AHFE) partners have prioritized alignment of employment and housing resources to help people who are experiencing, or are at-risk of homelessness, to achieve long-term economic and housing stability. This highly effective program connects employment and housing resources for homeless families, youth and communities of color. The Homeless Youth continuum far exceeded its target goals in FY 2018 but the outcomes are not anticipated for FY 2019. See other program offers for performance measures.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
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Explanation of Services

This program sustains critical capacity in several targeted employment and housing initiatives, with an emphasis on meeting the needs of families, youth, and communities of color. All programs assist households experiencing homelessness or housing instability by offering a combination of housing assistance and access to a range of workforce supports, provided in a culturally specific or culturally responsive manner. Programs include:

- Family Employment Services provides capacity to an existing network of six nonprofit employment providers, to connect families to career track employment services, housing resources and community-based support, and to the Employment Opportunity Program (EOP). Participants who are survivors of domestic violence and/or who are eligible for Supplemental Nutrition Assistance Program (SNAP) are prioritized.
- Youth Employment Services expands capacity provided by Homeless Youth Continuum partners to improve employment and housing alignment through pre-readiness support, job training, day labor opportunities and work experiences/internships.
- Equitable Access to Employment, implemented by a culturally-specific provider, supports individuals and families seeking employment and experiencing homelessness to secure culturally- specific employment services.

Adult Employment Services and Rent Assistance provides capacity through the EOP, and its multiple culturally-specific providers, to offer employment and housing support for adults, including adults in couples or parents with adult children, rent assistance for housing placement, and career coaching and expanded one-stop employment services and resources to serve young adults of color, many of whom are exiting the corrections system.

Equity Impacts

Multiple elements of structural racism drive racial disparities in homelessness both locally and nationally. Locally, people identifying as American Indian/Alaska Native are more than 400% more likely to experience homelessness than those identifying as White Alone, Not Hispanic; Black/African American or Native Hawaiian/Other Pacific Islanders are each nearly 200% more likely. People identifying as Black/African Americans represent 16.2% of those experiencing homelessness at a point in time; American Indian/Alaska Native, 10.2%; Hispanic/Latino, 10.2%; Native Hawaiian/Other Pacific Islanders, 2.6%; and Asian, 1.4%. Racial disparities are greater

among those who are doubled-up and among families with children versus adults.

Achieving equity in the delivery of homeless services requires that all communities have equitable access through multiple pathways into services, and that services are culturally-specific and - responsive. All JOHS investments are evaluated using an equity lens.

This program advances racial equity by targeting employment and housing resources to communities of color. Of the employment and housing support services provided to participants that are experiencing homelessness or at imminent risk of losing their housing, at least 75% are from communities of color.

Changes to Program

This program includes \$133,680 of one-time-only funding. In FY 2018-19, Employment Services were part of the Diversion program and have been moved into a stand-alone program.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	925,100
Sum:	0	0	0	925,100

Resources: The City's contribution to the JOHS budget includes City General Fund.

Expenses: City funds are pass thru payments to JOHS and are used to support contracted services. The total JOHS budget is represented in the Multnomah County budget where the office is hosted. For more information, please see the Multnomah County JOHS budget.

Staffing: Not applicable. See Multnomah County's Budget for staffing and FTE details.

Assets and Liabilities: N/A

Program Information

Bureau: Portland Housing Bureau

Program Contact: Marc Jolin

Website: multco.us/joint-office-homeless-services

Contact Phone 503-988-5531

JOHS Homelessness Diversion

Program Description & Goals

Diversion services are a subset of homelessness prevention strategies in our community. This program represents the City funding to reduce the number of people becoming street and shelter homeless in our community by diverting them from homelessness when they are leaving incarceration, a hospital, an unsustainable doubled-up situation. Done correctly, diversion is a much better strategy for the individual or family because they avoid the trauma of becoming homeless, and for the community, because, like other prevention strategies, it can be substantially less costly to divert a person from homelessness than to help them end it once they have become homeless.

Important Note: Unless otherwise noted, the outputs and outcomes presented in the JOHS Program Offers reflect total outputs/outcomes achieved through all investments in those program areas, including County and City ongoing and one-time funding, and additional leveraged state, federal and private resources.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of individuals prevented from becoming homeless	6,139	7,458	5,020	8,000	8,000

Explanation of Services

As an intervention, diversion is considered a trauma informed approach that keeps individuals and families from falling into street and shelter homelessness by helping them identify and gain access to alternative temporary and long-term housing options. Diversion is recognized nationally and locally as a critical tool in reducing street and shelter homelessness.

This program funds diversions from homelessness for AHFE priority populations, in particular for women, people of color and people with disabilities and people fleeing domestic violence. All of the providers contracted to provide services through this program are culturally specific or culturally responsive. Diversion occurs primarily through three recommended strategies adopted by the AHFE Executive Committee, all of which have been shown to be effective at diverting people from homelessness:

- Flexible financial assistance for agencies providing shelter or coordinating access to shelter that allows them to help people sustain a current non-permanent living situation (e.g. safely doubled up) rather than come to shelter;
- Staff and financial support to assist with placing people who are leaving healthcare and treatment programs directly into permanent housing; and,
- Long-distance transportation assistance to individuals and families with permanent housing options in other communities and who without the transportation assistance could not access that permanent housing and would instead access the local shelter system.

Equity Impacts

Multiple elements of structural racism drive racial disparities in homelessness both locally and nationally. Locally, people identifying as American Indian/Alaska Native are more than 400% more likely to experience homelessness than those identifying as White Alone, Not Hispanic; Black/African American or Native Hawaiian/Other Pacific Islanders are each nearly 200% more likely. People identifying as Black/African Americans represent 16.2% of those experiencing homelessness at a point in time; American Indian/Alaska Native, 10.2%; Hispanic/Latino, 10.2%; Native Hawaiian/Other Pacific Islanders, 2.6%; and Asian, 1.4%. Racial disparities are greater among those who are doubled-up and among families with children versus adults.

Achieving equity in the delivery of homeless services requires that all communities have equitable access through multiple pathways into services, and that services are culturally-specific and -responsive. All JOHS investments are evaluated using an equity lens.

Of those newly prevented from becoming homeless in FY 2018: 33% identified as Black/African American; 28% Hispanic/Latino/a/x; 8% American Indian/Alaska Native; 4% Native Hawaiian/Other Pacific Islander; and 4% Asian.

Changes to Program

This program includes \$1,255,560 of one-time-only funding.

In FY 2018-19, Employment Services were part of the Diversion program and have been moved into a stand alone program.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	841,380	1,530,197	2,356,295	1,525,500
Sum:	841,380	1,530,197	2,356,295	1,525,500

Resources: The City's contribution to the JOHS budget is City General Fund.

Expenses: City funds are pass thru payments to JOHS and are used to support contracted services. The total JOHS budget is represented in the Multnomah County budget where the office is hosted. For more information, please see the Multnomah County JOHS budget.

Staffing: Not applicable. See Multnomah County's Budget for staffing and FTE details.

Assets and Liabilities: N/A

Program Information

Bureau: Portland Housing Bureau

Program Contact: Marc Jolin

Website: multco.us/joint-office-homeless-services

Contact Phone 503-988-5531

JOHS Supportive Housing

Program Description & Goals

Supportive housing is recognized as the most successful intervention for people with significant disabilities who are homeless or at imminent risk of homelessness. Supportive housing is most commonly permanent housing, but in certain circumstances, including for people in recovery, transitional supportive housing (limited duration housing with intensive attached services) has proven an effective strategy to help people stabilize and return to un-supported permanent housing. The significant majority of supportive housing in our community is permanent supportive housing; it offers those who are chronically homeless or living with significant ongoing disabilities the combination of permanently affordable rent and longer-term wrap around support services they need to truly end their homelessness. This program offer funds a combination of long-term support services and operating expenses connected to supportive housing.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Total number of homeless individuals placed in permanent housing	4,889	5,591	4,513	5,900	5,900
Retention rate of households placed in permanent housing at 12 months	74%	59%	75%	75%	75%
Percentage of households moved from homelessness into housing that subsequently return to homelessness	27%	28%	27%	26%	26%

Explanation of Services

On any given night, there are nearly 1,300 individuals who have been homeless for more than a year and are living with one or more severe disabilities. These individuals are considered chronically homeless. Supportive housing programs are our community’s most effective response to chronic homelessness. Offering a combination of permanently affordable housing and appropriate ongoing support services has proven locally and nationally to be the most cost-effective way to end the homelessness of this population. This program offer provides continued support for two types of programs prioritized by and coordinated through AHFE for these individuals – transitional recovery housing and permanent supportive housing.

Supportive housing is for those who would not be successful in their housing without additional supportive services, and for whom services would be less effective without stable housing. Permanent supportive housing serves those with long-term disabilities, including mental illness and addictions, who usually have long-term or cyclical homelessness in their background. Transitional recovery housing serves those who require time-limited intensive recovery and other support services, but who can be anticipated to graduate from those intensive support services and into unsupported permanent housing. Transitional housing programs typically provide no-cost or extremely low-cost housing for up to two years, coupled with intensive recovery support services tailored to the needs of the program’s target population.

This program supports a range of supportive housing for highly vulnerable disabled adults. In some cases, funding is used to provide only the support services because rent assistance is provided through, for example, a grant from the U.S. Department of Housing and Urban Development (HUD). In other cases, funds support primarily the long-term rental subsidy needs of program participants,

and support services are leveraged through other systems, such as the health care system. Finally, there are programs where local funds provide both the rental assistance and the bulk of the support services because of the unique needs of the subpopulation served by the program and/or the absence of other sources of support.

Equity Impacts

Multiple elements of structural racism drive racial disparities in homelessness both locally and nationally. Locally, people identifying as American Indian/Alaska Native are more than 400% more likely to experience homelessness than those identifying as White Alone, Not Hispanic; Black/African American or Native Hawaiian/Other Pacific Islanders are each nearly 200% more likely. People identifying as Black/African Americans represent 16.2% of those experiencing homelessness at a point in time; American Indian/Alaska Native, 10.2%; Hispanic/Latino, 10.2%; Native Hawaiian/Other Pacific Islanders, 2.6%; and Asian, 1.4%. Racial disparities are greater among those who are doubled-up and among families with children versus adults.

Achieving equity in the delivery of homeless services requires that all communities have equitable access through multiple pathways into services, and that services are culturally-specific and -responsive. All JOHS investments are evaluated using an equity lens.

Of those served in Permanent Supportive Housing in FY 2018: 24% identified as Black/African American; 15% Hispanic/Latino/a/x; 13% American Indian/Alaska Native; 4% Native Hawaiian/Other Pacific Islander; and 3% Asian.

Changes to Program

In late 2017, the Portland City Council and the Multnomah County Board of Commissioners adopted parallel resolutions directing the development of a plan to guide the production of at least 2,000 new units of supportive housing in Multnomah County by 2028. The plan was completed in September 2018, and in the time since the Resolutions were adopted, the City, County and Home Forward have documented 517 new units of supportive housing that have already been developed or are in the pipeline. Many of these units have been created through coordinated capital investments from the Portland Housing Bond and dedicated supportive service funding through the Joint Office of Homeless Services. The creation of new supportive housing units will be dependent on identification of additional supportive housing capital, operating and services funding. Recent passage of the Metro Regional Affordable Housing Bond, completion of a related regional supportive housing plan (anticipated in early 2019), and advancement of developing partnerships with the health and criminal justice sectors will aid in these efforts.

This program includes \$471,440 of one-time-only funding.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	5,357,844	6,804,694	10,248,327	10,503,994
Personnel	2	-130	0	0
Sum:	5,357,846	6,804,564	10,248,327	10,503,994

Resources: The City's contribution to the JOHS budget includes City General Fund and the federal grant, Housing Opportunities for Persons with AIDS (HOPWA).

Expenses: City funds are pass thru payments to JOHS and are used to support staffing and contracted services. The total JOHS budget is represented in the Multnomah County budget where the office is hosted. For more information, please see the Multnomah County JOHS budget.

Staffing: Not applicable. See Multnomah County's Budget for staffing and FTE details.

Assets and Liabilities: N/A

Program Information

Bureau: Portland Housing Bureau

Program Contact: Marc Jolin

Website: multco.us/joint-office-homeless-services

Contact Phone 503-988-5531

JOHS Housing Placement/Retention

Program Description & Goals

This offer is for the City support for housing placement and retention. For the majority of people experiencing homelessness, returning to permanent housing requires a combination of a limited duration, highly flexible rent assistance, housing placement and retention support staffing, and income acquisition assistance. This housing placement and retention strategy, often referred to as “rapid rehousing”, is a recognized national best practice and critical element of the housing placement strategies prioritized through A Home for Everyone (AHFE) to significantly decrease homelessness among the most vulnerable in our community. It accounts for a significant majority of new placements into housing each year.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Total number of homeless individuals placed in permanent housing	4,889	5,591	4,513	5,900	5,900
Retention rate of households placed in permanent housing at 12 months	74%	59%	75%	75%	75%
Percentage of households moved from homelessness into housing that subsequently return to homelessness	27%	28%	27%	26%	26%

Explanation of Services

This program continues a range of existing housing placement and retention programs developed and coordinated through AHFE and the JOHS, including key elements of the housing placement capacity expansion initiated during FY 2017. These investments in rapid rehousing programs leverage significant federal, state and local resources to support the efforts of people experiencing homelessness to secure and retain permanent housing. Services are delivered by a range of highly skilled nonprofit partners and directed to communities of color, women, and other vulnerable adults experiencing homelessness. They include flexible rent assistance and housing placement and retention staffing accessed through:

- Culturally-specific service providers serving communities of color;
- Shelters, day centers and street outreach programs;
- The Short-Term Rent Assistance program that consolidates at Home Forward multiple federal, state and local funding streams into aligned eviction prevention and rapid rehousing delivered through close to 20 non-profit partners; and,
- Multi-agency mobile in-reach teams that include staff from culturally-specific, domestic violence, and behavioral health providers to assist adults in emergency shelters and other safety-off-the-streets options (like organized camps) to quickly exit shelter and return to housing.

Equity Impacts

Multiple elements of structural racism drive racial disparities in homelessness both locally and nationally. Locally, people identifying as American Indian/Alaska Native are more than 400% more likely to experience homelessness than those identifying as White Alone, Not Hispanic; Black/African American or Native Hawaiian/Other Pacific Islanders are each nearly 200% more likely. People identifying as Black/African Americans represent 16.2% of those experiencing homelessness at a point in time; American Indian/Alaska Native 10.2%; Hispanic/Latino, 10.2%; Native Hawaiian/Other Pacific Islanders, 2.6%; and Asian, 1.4%. Racial disparities are greater among those who are doubled-up and among families with children versus adults.

Achieving equity in the delivery of homeless services requires that all communities have equitable access through multiple pathways into services, and that services are culturally-specific and -responsive. All JOHS investments are evaluated using an equity lens.

Of those newly placed in Rapid Rehousing in FY 2018: 42% identified as Black/African American; 16% Hispanic/Latino/a/x; 11% American Indian/Alaska Native; 5% Native Hawaiian/Other Pacific Islander; and 3% Asian.

Changes to Program

\$252,000 of housing placement contracted staffing and the associated client rent assistance was reduced to meet the 1% General Fund Constraint.

This reduction eliminates the safe parking pilot program that partners with faith institutions to host people sleeping in vehicles, RVs, or sleeping pods in their parking lots as a form of safety off the streets. It also reduces the capacity for the Coordinated Housing Assessment Team (CHAT), which provides services to highly vulnerable people who need more intensive staff engagement and support. \$185,000 of previously contracted funds are being reallocated into direct staffing to support the ongoing adult system programming work of the JOHS. We expect that any reductions in household placements will be offset by improvements in overall system support and service coordination resulting from more appropriate system staffing. This program includes \$1,859,620 of one-time-only funding.

Reported 12-month retention rates are anticipated to remain at FY 2018 levels due to continued housing market challenges and income stagnation.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	12,246	608,264	8,896,785
Sum:	0	12,246	608,264	8,896,785

Resources: The City's contribution to the JOHS budget is City General Fund.

Expenses: City funds are pass thru payments to JOHS and are used to support staffing and contracted services. The total JOHS budget is represented in the Multnomah County budget where the office is hosted. For more information, please see the Multnomah County JOHS budget.

Staffing: Not applicable. See Multnomah County's Budget for staffing and FTE

details.

**Assets and
Liabilities:** N/A

Program Information

Bureau: Portland Housing Bureau

Program Contact: Marc Jolin

Website: multco.us/joint-office-homeless-services

Contact Phone 503-988-5531

JOHS Safety Off the Streets

Program Description & Goals

This offer represents the City support for basic safety of people experiencing homelessness. This includes a range of emergency night and day shelter services, including shelter for specific populations, winter and severe weather shelter, and associated emergency services expenses. While not a solution to homelessness, emergency shelter and associated emergency services are vital to protecting the basic health and safety of individuals and families while they are experiencing homelessness, particularly those with disabling conditions and older adults. Day and night shelters are also critical locations for people to learn about and access the services they need to find permanent housing, acquire an income, and receive health-related services. Most adult shelters have priority access for women, Veterans, those with disabilities and those ages 55 & older. Other shelters are specifically for youth under 24, domestic violence survivors, and families with children.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Average length of time (days) spent in homeless shelter (all populations)	60	48	85	110	110
Number of individuals who accessed homeless services, but who had not accessed homeless services in the previous two years	6,077	5,018	6,400	5,000	5,000

Explanation of Services

The basic safety of people experiencing homelessness requires funding for a full range of emergency night and day shelter services, including shelter for specific populations, severe weather shelter, and associated emergency services expenses. Emergency shelter and associated emergency services are vital to protecting the basic health and safety of individuals and families while they are experiencing homelessness, particularly those with disabling conditions and older adults. Day and night shelters are also critical locations for people to learn about and access the services they need to find permanent housing, acquire an income, and receive health-related services. Most adult shelters have priority access for women, Veterans, those with disabilities and those ages 55 and older. This program includes the following:

Night shelter: Overnight shelter programs for all populations include approximately 1,400 beds of year-round shelter and 300 beds of winter shelter. Shelters are low-barrier and most, such as the Willamette Center, operate 24/7. Funds are contracted to nonprofit providers to pay the operating expenses for shelter, including maintenance, staffing, materials/supplies, and on-site services.

Day shelter: Day shelters serve the purpose of providing a safe place to be out of the elements during the day, access to showers and other hygiene services, and as a vital point of access to the services needed to end homelessness. Day shelters function as resource centers, bringing together numerous partners at one location to offer an array of services, including employment, health care, and education.

Severe weather shelter: In the event of severe weather that significantly elevates the risk to people sleeping unsheltered in our community, additional shelter capacity is created that remains in place for the duration of the severe weather event. This program includes base funding that is contracted

to a nonprofit agency to open severe weather shelter on an as-needed basis during the course of the year.

Emergency assistance: This program also funds an array of services associated with ensuring basic safety, including staffing, flexible funding for material needs, and extended information and referral services during winter months.

Alternative shelter: Alternative shelter spaces (including, e.g., “villages”) provide a safe space to sleep and access resources for those who are not currently served by traditional shelters. People using these alternative shelters have improved access to services with the goal of moving in to permanent housing as quickly as possible.

Equity Impacts

Multiple elements of structural racism drive racial disparities in homelessness both locally and nationally. Locally, people identifying as American Indian/Alaska Native are more than 400% more likely to experience homelessness than those identifying as White Alone, Not Hispanic; Black/African American or Native Hawaiian/Other Pacific Islanders are each nearly 200% more likely. People identifying as Black/African Americans represent 16.2% of those experiencing homelessness at a point in time; American Indian/Alaska Native, 10.2%; Hispanic/Latino, 10.2%; Native Hawaiian/Other Pacific Islanders, 2.6%; and Asian, 1.4%. Racial disparities are greater among those who are doubled-up and among families with children versus adults.

Achieving equity in the delivery of homeless services requires that all communities have equitable access through multiple pathways into services, and that services are culturally-specific and -responsive. All JOHS investments are evaluated using an equity lens.

Of those served in Emergency Shelter in FY18: 21% identified as Black/African American; 13% Hispanic/Latino/a/x; 12% American Indian/Alaska Native; 4% Native Hawaiian/Other Pacific Islander; and 2% Asian.

Changes to Program

The Adopted Budget adds \$250,000 in ongoing funding to support increased operating costs for two higher quality, year-round adult shelters in the coming fiscal year. Year-over-year decreases in total people served in shelter are primarily due to increased length of time in shelter, as people in shelter continue to face challenges finding permanent housing opportunities. Increased permanent housing placement will likely decrease length of time in shelter and increase numbers served in shelter. This program includes \$2,793,250 of one-time-only funding.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	10,649,973	7,443,824	9,898,582	10,716,344
Personnel	28,839	37,398	0	0
Sum:	10,678,812	7,481,222	9,898,582	10,716,344
FTE	0.22	0.28	0	0

Resources: The City's contribution to the JOHS budget is City General Fund and the federal Emergency Solutions Grant (ESG).

Expenses: City funds are pass thru payments to JOHS and are used to support staffing, contracted services, and facilities charges. The total JOHS budget is represented in the Multnomah County budget where the office is hosted. For more information, please see the Multnomah County JOHS budget.

Staffing: Not applicable. See Multnomah County's Budget for staffing and FTE details.

Assets and Liabilities: Not applicable.

Program Information

Bureau: Portland Housing Bureau

Program Contact: Marc Jolin

Website: multco.us/joint-office-homeless-services

Contact Phone 503-988-5531

JOHS System Support Services

Program Description & Goals

Improving system coordination and access is one of the core strategies of A Home for Everyone. This program funds an array of support services needed to make homeless services easier to access and more effective. These services support systems of care across populations as well as specific sub-populations (adults, families, youth, Veterans and domestic violence survivors). These supports include training, information and referral services, coordinated entry, partnership development, and other similar services. See other program offers for performance measures.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
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Explanation of Services

The effectiveness of homeless services, overall and at the population-specific level, depends on the support services funded through this program. These services include:

- **Access:** Equitable and efficient access to available services is an essential commitment of A Home for Everyone. Access starts with information about the services available, and that information must be available in a variety of formats to reach diverse populations. Programs supported in this area include telephone, online and print information and referral, as well as in-person assessment. Equitable and efficient access to services also requires coordinated entry systems tailored to specific populations.
- **Training/Education:** Through A Home for Everyone, our community has adopted a set of guidelines for the delivery of services, and those guidelines anticipate certain shared practices that require system-wide and population-specific training for staff. There are also training and education programs offered to support people seeking services, both community-wide and within specific populations.
- **Partnership Development:** Increasing the resources available to people experiencing homelessness, beyond those funded through the JOHS, requires the development of partnerships that leverage resources in other systems and in the private sector. This program offer funds programs that foster these partnerships for the benefit of the effort to end homelessness as a whole and for specific populations. Examples include coordination among landlords and service providers, as well as services to recruit and support landlords to make units available for households referred through community nonprofits.
- **Point-In-Time Count:** In order to receive HUD funding, communities must conduct an annual point-in-time count of people sleeping in homeless shelters and a biennial point-in-time count of people sleeping in places not meant for human habitation (i.e. tents, cars, etc.). The sheltered and unsheltered count is a community-wide effort involving dozens of organizations. The funding requested will provide the support necessary to undertake a count including administrative support, communication, partner coordination, volunteer recruitment and management, as well as data entry and evaluation.

Equity Impacts

Multiple elements of structural racism drive racial disparities in homelessness both locally and nationally. Locally, people identifying as American Indian/Alaska Native are more than 400% more likely to experience homelessness than those identifying as White Alone, Not Hispanic; Black/African American or Native Hawaiian/Other Pacific Islanders are each nearly 200% more likely. People identifying as Black/African Americans represent 16.2% of those experiencing homelessness at a point in time; American Indian/Alaska Native, 10.2%; Hispanic/Latino, 10.2%; Native Hawaiian/Other Pacific Islanders, 2.6%; and Asian, 1.4%. Racial disparities are greater among those who are doubled-up and among families with children versus adults.

Achieving equity in the delivery of homeless services requires that all communities have equitable access through multiple pathways into services, and that services are culturally-specific and -responsive. All JOHS investments are evaluated using an equity lens.

On a quarterly basis, between 29% and 32% of the Information and Referral callers were African American, 13-14% were Hispanic or Latino, 6% were Native American or Alaska Native, and 2-3% were Asian or Native Hawaiian/Other Pacific Islander, respectively.

Changes to Program

The additional 40% or \$431,800 of the City General funds for this program can be found in the Direction to Develop package for continuation of services funded with one-time-only funding.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	1,587,561	102,772	1,045,910	1,152,540
Personnel	37,267	23,829	0	0
Sum:	1,624,828	126,601	1,045,910	1,152,540
FTE	0.26	0.17	0	0

Resources: The City's contribution to the JOHS budget is City General Fund.

Expenses: City funds are pass thru payments to JOHS and are used to support staffing and contracted services that cross systems of care and populations to improve access to homeless services. The total JOHS budget is represented in the Multnomah County budget where the office is hosted. For more information, please see the Multnomah County JOHS budget.

Staffing: Not applicable. See Multnomah County's Budget for staffing and FTE details.

Assets and Liabilities: Not applicable.

Program Information

Bureau: Portland Housing Bureau

Program Contact: Marc Jolin

Website: multco.us/joint-office-homeless-services

Contact Phone 503-988-5531

Economic Opportunity Initiative

Program Description & Goals

PHB funds the Economic Opportunity Initiative (EOI), a citywide program focused on increasing income and economic self-sufficiency for very low-income residents. Prosper Portland administers the microenterprise component of the program and contracts with seven community agencies to provide services. Worksystems, Inc. administers the adult and youth workforce components and contracts with eleven community agencies to provide employment services.

The goals of the program are to increase the incomes and economic opportunities for very low-income Portland residents through workforce and microenterprise development. EOI is focused on reaching participants who often face multiple barriers to employment, including but not limited to: homelessness, limited English proficiency, criminal histories, drug and alcohol addictions, and lack of educational credentials and job preparation skills.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Total number of workforce participants	1,178	1,394	825	825	825
Total number of Microenterprise participants	262	210	350	300	300
Percentage of workforce participants employed at graduation	65%	40%	65%	40%	40%
Percentage of microenterprises increasing economic stability at program exit	85%	41%	85%	41%	41%

Explanation of Services

The City Council authorized the formation of the EOI program in 2004 to increase economic development and workforce opportunities for very low-income Portland residents. Advancing economic opportunity is a goal of the City and part of the City/Multnomah County Consolidated Plan. In July 2009, EOI was transferred from the former Bureau of Housing and Community Development to Prosper Portland. The PHB maintains an IGA with Prosper Portland to implement this direction. The mission of the EOI is to provide services in the categories of microenterprise and workforce development. The initiative prioritizes reaching people with multiple barriers to economic opportunity, including those experiencing homelessness, limited English proficiency, criminal histories, drug and alcohol addictions, and lack of education and job preparation skills.

There are two components to the EOI, Microenterprise and Workforce Development. The Microenterprise component consists of Prosper Portland contracting with community-based organizations to provide technical assistance and training to business owners and entrepreneurs in various areas including licensing, financing and taxes, business plans, financial literacy, legal assistance, marketing, product development, production and management strategies. Program success is measured by the number of individuals receiving microenterprise services and the number of businesses achieving stabilization and growth milestones.

The Workforce Development component of the program is accomplished by Prosper Portland contracting with Worksystems, Inc., our jurisdiction's local workforce investment board, to administer services through sub-recipient contracts with community-based agencies. These agencies provide the following services to youth and adult job seekers: career planning, work readiness training, job training and placement, job search assistance, college readiness, post-

secondary placement and retention support. Additionally, organizations are funded to provide community-based workforce navigation services through the workforce system. Success of this program is determined by the amount of people served with workforce services, placed in employment, and enrolled in post-secondary education.

Equity Impacts

The goal of EOI is to provide access to services for individuals from marginalized communities. EOI partners include culturally-specific and culturally responsive agencies who prioritize reaching participants from communities of color, immigrants and refugees and low-income participants. Additionally, the workforce program prioritizes support to those who have drug and/or alcohol addictions or have a history with the criminal justice system. Last fiscal year (FY17-18,) 68% of participants in EOI identified as people of color. Data is collected and reported on a quarterly basis and is disaggregated by race and ethnicity. Program staff analyze data to determine issues and opportunities for improvement to advance more equitable access and outcomes. One significant change implemented in FY17-18 was adding capacity of two culturally appropriate Workforce Community Navigator staff (for a total of three FTE), to reach individuals and communities not currently engaged with WorkSource centers and/or who are experiencing additional barriers to accessing services.

Changes to Program

EOI services in FY 2019-20 are anticipated to be funded at approximately the same level as FY 2018-19 year. PHB anticipates a similar entitlement amount from HUD in FY 2019-20. The program will not be impacted by the 1% constraint requirement. EOI plans to maintain consistent staffing levels to provide services in FY 2019-20.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	-21,196	0	0	2,280,648
Personnel	0	0	0	0
Sum:	-21,196	0	0	2,280,648
<hr/>				
FTE	0	0	0	0

Resources: This program is funded by CDBG, a federal entitlement grant. CDBG for EOI funding is based on a standard percentage applied to entitlement amount from HUD. PHB reimburses Prosper Portland for as expenses are incurred.

Expenses: Funds for EOI support direct service delivery. A majority of the funding covers personnel expenses at partner organizations. A smaller portion covers participant support services which includes items necessary for clients to access services such as work clothing, transportation fees and school supplies. CDBG funds may also be used for operating costs that are explicitly connected to the direct services being delivered. CDBG funding does not cover any administrative costs for the sub-recipients.

Staffing: CDBG funding does not cover any staffing costs at Prosper Portland or Worksystems, Inc.; those costs are covered through other non-PHB funding sources. CDBG and additional funds cover personnel at four service delivery organizations for microenterprise and 13 service delivery organizations (22 programs) for workforce development. Staffing at partner

organizations is directly linked to how much funding is allocated to these programs each year. The PHB contract manager (0.05 FTE) is funded by CDBG as well.

Assets and Liabilities: N/A

Program Information

Bureau: Portland Housing Bureau

Program Contact: Jennifer Chang

Website: www.portlandoregon.gov/phb/26428

Contact Phone 503-823-2391

Housing Development Support

Program Description & Goals

This program encompasses support services and captures other general expenditures related to the long-term successful operation of multifamily affordable housing and Portland Housing Bureau's partners. This program is supported by staff in the Housing Investment and Portfolio Preservation (HIPP) team and the Risk Analysis and Compliance (RAC) team.

Program components include:

- the Risk Management Pool (RMP), funded by the bureau and managed by the Housing Development Center (HDC);
- Community Housing Development Organization (CHDO) operating assistance, funded by HOME funds and used by a CHDO (private non-profit, community-based organizations) that have staff with the capacity to develop affordable housing for the community it serves;
- The HOME Consortium, designated by HUD is a way for local governments that would not otherwise qualify for funding to join with other contiguous units of local government to directly participate in HOME funds; and
- HUD Section 108 loan repayment.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
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Explanation of Services

The RMP provides funds training and education to the owners of multifamily affordable rental housing providing supportive housing. The pool also makes payments in the event a claim is made against the RMP. HDC will review and process the paperwork to ensure compliance with the RMP requirements.

CHDO Operating funds support capacity building among qualified owner, developer, or sponsor entities of HOME funded projects just before, during, and just after a project that is an eligible set-aside activity.

HOME Consortium activities include participation by Multnomah County in joint projects with PHB (like the Stark Street project currently under construction) and homeownership loans provided by the City of Gresham.

Section 108 activity in this program is the annual repayments to HUD, which will extend beyond 2030.

Equity Impacts

The RMP is targeted for residents who have been or are currently homeless. A significant portion of the local homeless population also suffer from chronic mental health issues, substance abuse and addiction. Locally, we have a disproportionately high number of people of color amongst the homeless population, specifically African Americans, who earn significantly less and have been priced out of most neighborhoods in Portland.

Changes to Program

In the current fiscal year, workload and deliverables have not changed as management of these contracts continue without shifts in the Bureau requirements. The RMP will be re-evaluated as part of the regional discussion on funding PSH units.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	930,696	879,880	2,232,714	1,764,120
Internal Materials and Services	0	431	0	0
Personnel	71,986	138,974	62,000	79,796
Fund Expense				
Contingency	0	0	154,000	0
Debt Service	726,268	734,577	16,408,000	756,000
Fund Transfers - Expense	636,237	5,133,333	1,162,705	2,841,340
Sum:	2,365,187	6,887,196	20,019,419	5,441,256
FTE	0	0	2.08	0.6

Resources: Program resources include the federal HOME entitlement grant, reserved for use by Multnomah County, Gresham, and CHDO eligible partners, as well as the federal CDBG entitlement committed to Section 108 loan payments. The Risk Mitigation Pool is a reserve located in the Housing Investment Fund that has been in place for over ten years. Staff costs have multiple funding sources, including tax increment financing and federal grants.

Expenses: Program expenses include the staffing costs for portions of several position supporting these program elements among the HIPP and RAC teams. Home Consortium funding reflects federal HOME grant dollars anticipated to be spent by Multnomah County and Gresham. The Section 108 repayment is made from PHBs CDBG entitlement, offset partially by payments made to PHB by project funding partners.

Staffing: Staffing is 0.6 FTE, which reflects portions of several positions in the bureau working on specific program activities as well as general support of multi-family project financing.

Assets and Liabilities: Section 108 loan payments to HUD are a program liability that extends beyond FY 2030, and currently results in approximately \$730,000 in annual debt service. This payment reflects a pool of funds that financed capital assets owned by other non-governmental entities through loans to those entities. These assets, while not owned by the City, represent a significant and critical component in the affordable housing resources available to the residents of Portland.

The RMP is an asset maintenance tool that PHB makes available to affordable housing owners and developers as discussed in the program description section. As noted above, while these assets are not owned by the City, they are assets funded by the City.

Program Information

Bureau: Portland Housing Bureau

Program Contact: Jill Chen

Website: <https://www.portlandoregon.gov/phb/74685>

Contact Phone 503-823-3339

Multi Family Affordable Ownership Project Financing

Program Description & Goals

Since 2016, PHB has focused on creating affordable homeownership opportunities in the Interstate Corridor Urban Renewal Area (ICURA) for qualified households prioritized through the N/NE Preference Policy. Although real estate prices in Portland have recently leveled, most homes continue to be out of reach for the average low and moderate-income households. The lack of affordable homeownership inventory continues in the private market, particularly in neighborhoods that are gentrifying such as in N/NE Portland. In the 2017 Notice of Funding Availability (NOFA), PHB addressed this by focusing resources and available land on subsidizing the development of new multifamily condo development for mixed income projects. PHB continues to administer Prosper Portland N/NE Community Development Initiative resources to help moderate income households (80% AMI to 120% AMI) purchase and retain homes within the Interstate Urban Renewal Area.

The Multi Family Affordable Ownership Project Financing program collaborates with several Bureau programs; including the Policy and Planning program who identifies N/NE Preference buyers and with the Homeowner Access program who coordinates buyer readiness and home ownership training. The Bureau works with its partners to leverage City resources to develop projects such that its investments can become a permanent subsidy upon sale to qualified low-income buyers. During FY17-18, it was determined that \$125,000 per unit subsidy was required for the construction of new permanently affordable homes in the ICURA and that PHB's subsidy could apply to those households earning 80% Area Median Income (AMI) or less for a 2BR and 100% AMI or less for a 3BR. These subsidized homes are permanently affordable and regulated at their respective income levels even after the initial home owners sells their home.

Program commitments are presently exclusive to the implementation of the N/NE Housing Strategy and include: The Olin, a Habitat for Humanity development, for 12 affordable condos which is under construction; the Kilpatrick Phase 1 & 2 , a Habitat for Humanity development, for 30 affordable condos expected to start construction by 4/30/19; and a Proud Ground Project for 40 new affordable condos on 5020 Interstate, PHB owned land, which is in pre-development. This is a new program offer and does not yet have program-specific performance measures.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
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Explanation of Services

This program seeks to address the need for affordable home ownership and the opportunity for wealth creation especially for people of color who historically have been displaced in N/NE Portland. The program provides affordable homes to low and middle-income households, earning on average between 45-100% Area Median Income (AMI) or from \$36,630 to \$81,400 for a family of four. Housing produced under this program is regulated for a minimum of 99 years or is permanently affordable.

New multifamily, affordable condos cannot be developed without subsidy which buys down the cost of the affordable units. This program provides the needed City funds to enable the projects to be developed by non-profit partners. This program seeks to optimize Bureau investments, including

land leases, by working with other funding sources including commercial banks/lenders, philanthropic institutions and the State. Bureau staff works with the developer during predevelopment, financial close, through completion of construction. The total process can be 12 months to over 4 years depending on size and complexity of the development.

This program provides the opportunity for home ownership to many households whose families were severely impacted by displacement in ICURA. Units sold provide housing stability to home owners and gives them the opportunity for wealth creation.

Equity Impacts

For all PHB multifamily development programs, PHB partners are required to report on their efforts to provide contracting opportunities to minority, women and emerging small business (MWESB), and must comply with federal and local low-income workforce utilization goals. However, PHB partners have indicated that it may be difficult to meet these targets due to the leveraged “sweat equity” required by some of the projects. In addition, MWESB subcontracting performance remains a challenge largely due to the extremely tight construction market and the difficulty in finding certified firms with available capacity.

Changes to Program

PHB has created the Multi Family Affordable Ownership Project financing program in response to market trends of homeownership affordability. The median home sales price citywide rose from \$257,487 in 2011 to \$406,192 in 2017, an increase of 58 percent, or over \$148,000. The median home sales price in Portland now exceeds \$400,000 in over two thirds (68 percent) of the neighborhoods in the city. The median home sales price in the Interstate Corridor is \$449,386, an increase of 71% from the 2011 median of \$263,435, making affordable homeownership out of reach for most people of color whose families have been displaced in the ICURA. According to the State of Housing Report, homeownership rates among Black, Native, and Hawaiian-Pacific-Islander households is 30% or less compared to White households at 54%.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	3,380,000
Personnel	0	0	0	175,345
Sum:	0	0	0	3,555,345
FTE	0	0	0	1.35

Resources: The Multi Family Ownership Project Financing program is currently focused in the ICURA, utilizing TIF funds limited to that geographic area. TIF funds for multi-family ownership are currently riding benefitting from resources created by the increase in housing set-aside in 2015. As forecast by both the Bureau and Prosper Portland over the last few years, TIF funding will subside over the next four years as almost all districts reach maximum indebtedness or the final year to issue debt. To continue the program and expand its geographic reach additional sources of funds will need to be developed.

Expenses: Almost all program expenditures are disbursements made as part of the

financing package for multi-family affordable ownership projects. PHB lends the resources listed above to make up a financing “gap” typically found with affordable projects. These gap funds cover the difference between the equity a project attracts and the money that can be borrowed against the project as part of the financing package. For FY 2019-20, the amounts appropriated are either a) projects under construction, b) projects with a legal funding commitment, or c) projects for which funding has been awarded. The secondary cost is staffing costs for the team related directly to the packaging and oversight of the Bureau contribution to projects.

Staffing: Staffing for this program consists of 1.35 FTE, budgetarily, and includes staff from multiple teams to effectively implement the program.

Assets and Liabilities: This program finances capital assets owned by other non- governmental entities through loans. These assets are represented on the City’s financial statements by loan receivables (for which the City holds a property lien). The value received by the City through the loans is the value of the units created in the community. These assets, while not owned by the City, represent a significant and critical component in the affordable housing resources available to the residents of Portland.

Both PHB gap-financed and owned multi-family buildings are required to have asset management plans and replacement reserves. For the gap financed projects, the bureau has an Risk Assessment and Compliance (RAC) team that reviews regulatory agreements for compliance with asset management requirements, grant funding requirements, and in some cases financial condition. In addition, physical condition inspections are done by construction coordinators as requested by the RAC team.

Program Information

Bureau: Portland Housing Bureau

Program Contact: Jill Chen

Website: <https://www.portlandoregon.gov/phb/index.cfm?&c=72705>

Contact Phone 503-823-3339

Development Incentives

Program Description & Goals

The Development Incentives program encompasses all financial incentives and exemptions related to the production of affordable housing in both the private market and regulated affordable housing. The program includes the Inclusionary Housing (IH), Multiple-Unit Limited Tax Exemption (MULTE), Non-Profit Limited Tax Exemption (NPLTE), Homebuyer Opportunity Limited Tax Exemption (HOLTE), System Development Charge (SDC) Exemption and Affordable Housing Construction Excise Tax (CET) Exemption, and the Mortgage Credit Certificate (MCC) Programs.

The program's primary goals are to promote inclusion of affordable housing in otherwise market-rate developments and to assist affordable housing developed and operated by non-profit partners, as well as to make homeownership more affordable to low- to moderate-income households.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of households receiving indirect assistance through foregone revenue (mortgage credit certificate, limited tax exemption, and system development charge exemption)	142	104	142	140	140
Percentage of housing units opened or preserved in high opportunity areas	73%	60%	50%	50%	50%

Explanation of Services

Policy makers at the State and City Council implemented regulations to increase the number of affordable units built. For-profit and non-profit housing developers benefit from exemption programs, reducing permitting expenses and the on-going cost of property taxes for both rental and homeownership projects, as well as, both single- and multi-family developments. Homebuyers also benefit from a reduction in their long-term income taxes.

The Inclusionary Housing Program requires that buildings with 20 or more new units make at least 20% of the units affordable to households earning at or below 80% of median family income (MFI) with options for complying. The options include: 1) provide 10% of the new building's units at or below 60% MFI; 2) provide 20% of the new building's units at 60% MFI; 3) provide 20% of the new building's units at 60% MFI, or 10% of the new building's units at 30% MFI, in another new building; 4) provide 25% of the new building's units at 60% MFI, or 15% of the new building's units at 30% MFI, in an already existing building; or 5) pay a fee-in-lieu of providing affordable units.

The MULTE, HOLTE and NPLTE Programs, as well as the SDC and CET Exemption Programs reduce the cost of developing and preserving affordable multi- and single-family rental and homeownership projects.

The Mortgage Credit Certificate Program makes homeownership more affordable and accessible through a direct federal income tax credit.

Staff reviews and approves applications prior to construction of new developments, and prior to home purchases to confirm that both the property and the homebuyer meet program criteria. The outcomes of these programs can be seen through creating mixed-income neighborhoods, more affordable units for 10, 60 or 99 years ensuring long-term stability for families, keeping home prices below market rates, and reduced property or income taxes.

Equity Impacts

Developers providing affordable housing through the IH, MULTE, HOLTE and SDC exemption programs are encouraged to partner with local non-profit housing providers to reach households most in need of the affordable housing the program makes available. The MULTE Program requires that at least 5% of affordable units within a project be fully adaptable to ADA standards.

The interim-use MULTE program requires applications to include a contract with a third-party technical assistance provider to help the general contractor be successful towards reaching a 20% participation goal in construction contracting by MWESB firms.

Changes to Program

Although the dynamics of the housing market are constantly evolving, the need for affordable housing, including at 60% and 80% median family income continues. Changes to programs include:

- Refinements to the IH Program including adjustments to the applicability of the MULTE program for IH projects, consolidation and clarification of the IH fee-in-lieu rates, and the adoption of administrative rules for the IH Homeownership program;
- Approved use of the MULTE program on an interim basis for projects not required to participate in the IH Program; and
- Monitoring the income affordability of subsequent homebuyers purchasing homes in the HOLTE Program.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	20,826	47,466	163,533	1,110,459
Internal Materials and Services	1,738	125,956	24,547	8,572
Personnel	165,181	211,297	363,868	753,878
Ending Fund Balance	1,847,976	11,139,941	0	0
Sum:	2,035,721	11,524,660	551,948	1,872,909
FTE	2.67	3.71	3.45	6.15

Resources: Program income is currently generated through application and processing fees. Cost of living adjustments to these fees are anticipated for FY 2019-20. It is planned that a portion of in-lieu fee payments will become the primary funding stream for these program activities, but the bureau is looking at additional options. Further, the FY 2019-20 Adopted Budget includes \$150,000 in one-time General Fund resources for a market analysis to provide data and analysis for ongoing refinements to the Inclusionary Housing program incentives and requirements.

Expenses: Program costs for the inclusionary housing and indirect program activities are primarily for staffing and indirect costs. On-going expenses are limited and include document recording fees, payment to the Multnomah County for each MULTE and HOLTE application approved, and an application fee to the State upon renewing allocations for the MCC. PHB allocates a percentage of the CET revenue, per code, to Bureau of Development Services for their role in applying the fees and exemptions within building

permits and collecting revenue. In addition, 15% of residential CET is remitted to the State of Oregon Housing and Community Services department. The remaining CET is available for affordable housing under specific guidelines in statute.

Staffing: Staffing for the program is 6.15 FTE, one of which is limited-term. With the continuance of the IH Program, it is necessary to continue funding for the limited-term position to ensure sufficient customer service and timely review of applications to not delay building permits.

Assets and Liabilities: While no City-owned assets are created by the program, affordable housing assets owned by third-parties are created via indirect subsidy (limited tax exemptions and development fee waivers) and regulation (inclusionary zoning code).

Program Information

Bureau: Portland Housing Bureau

Program Contact: Dory Van Bockel

Website: <https://www.portlandoregon.gov/phb/72626>

Contact Phone 503-823-4469

Metro GO Bond Multi-Family Rental Housing Project

Program Description & Goals

In 2018 Metro-area voters approved Measure 26-199, the first ever Regional Affordable Housing Bond, which authorizes Metro to issue up to \$652,800,000 in general obligation bonds for the development or acquisition of affordable housing. Leading up to the vote, Metro conducted a series of public engagement activities. From those emerged the Regional Investment Strategy (Strategy) for the Metro Bond. The primary goal of the Metro Housing Bond Program is create at least 3,900 new affordable homes, of which:

- At least 1,600 will be affordable to households making 30% of area median income (AMI) or below;
- At least 1,950 will be sized for families, with 2 or more bedrooms;
- No more than 10 percent will be provided for households making 61-80% of area median income.

Multnomah County’s share, using a formula based on assessed (real property) value, is roughly 45%. Using AV to allocate funds results in approximately \$200M for Portland to create over 1,400 units of affordable housing, serving up to 4,500 people. The program is brand new with no implementation history. As the program rolls out, PHB will track, among other things, dollars spent, units created, and people served.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
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Explanation of Services

PHB as the lead for the Metro Bond program for property in the city of Portland was decided during the planning that led up to the November 2018 ballot measure. The program directly aligns with, and other than program-specific goals, is nearly identical to the city’s existing Housing Bond Program: 100% of the units created through the program will serve households earning 60% or less of area median income (AMI). Metro Bond goals for Portland include 605 units at 0-30% AMI (there is no PSH goal currently). Also included in this program is a fund that uses the \$4/night short-term rental fee as a source to help subsidize operations of buildings developed using Metro Bond funds, likely in the form of a voucher. While the Portland and Metro Housing Bond Programs are similar in goals and affordability targets, the implementation strategy for the Metro bonds will need to reflect the different types of operating support to achieve those goals.

Equity Impacts

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:

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

Metro will be requiring all implementation parties to conduct a robust community engagement planning process prior to the release of funds. Local plans will include strategies to advance racial equity strategies to eliminate barriers in accessing housing for communities of color and other historically marginalized communities.

Changes to Program

PHB's implementation of the Metro Bond program is brand new as the initiative that authorized the bond was passed by voters in November 2018.

PHB anticipates using existing staffing for early implementation of the program. As the program parameters are developed by Metro, PHB will assess the need for additional staff support for finance, legal and program implementation. No operating or rent support has yet been identified for these units. This fund would as currently conservatively contemplated could sustain approximately 100-140 units for 30 years.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	150,000
Internal Materials and Services	0	0	0	0
Personnel	0	0	0	111,151
Sum:	0	0	0	261,151
<hr/>				
FTE	0	0	0	0.8

Resources: Primary resources for this program are proceeds from the Metro GO Bond. The exact nature of the flow of funds to the City has not been determined at this time.

Expenses: The primary expenses of the program are expected to be disbursements made as part of the financing package for multi-family affordable rental housing projects. The secondary cost is staffing costs for the team related directly to the packaging and oversight of the Bureau contribution to projects.

Staffing: Staffing for this program is 0.8 FTE for the initial planning and projects under the Metro Bond. PHB will utilize its existing executive, community engagement, finance and implementation staff during the early implementation of the bond. These staff collaborate with other bureau staff and the City Attorney's Office.

Assets and Liabilities: At this time, the nature of this program would finance capital assets owned by other non- governmental entities through loans. These assets are represented on financial statements by loan receivables (for which a property lien would be held), The value received by this figure is the units developed using these loans. The capital assets, while not owned by the City, represent a significant and critical component in the affordable housing resources available to the residents of Portland. However, the financial relationship between the City and Metro has not been fully defined, especially in terms of assets and liabilities.

Program Information

Bureau: Portland Housing Bureau

Program Contact: Karl Dinkelspiel

Website:

Contact Phone 503-823-1354

Multi Family Affordable Rental Project Financing

Program Description & Goals

The Multi Family Rental Project Financing program manages large investments in the City's new affordable housing portfolio to ensure affordable housing units are brought on-line and available in a most practicable manner. The multi-family delivery team, working through its partners, leverage City resources to develop new construction that deliver quality, affordable housing units which are rent regulated long term, up to 99-years.

The team is also responsible for any restructures and rehabilitations of the Bureau's prior investments. The regulated affordable rental housing portfolio consists of approximately 400 properties with over 13,000 units spread throughout the City. While creating new affordable housing units is critical, it is just as crucial to maintain the existing affordable stock. As with new construction, the team seeks to leverage existing resources, including those from the City, to redevelop projects and improve the quality and habitability of existing units and in many cases extend the City's regulatory terms.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Vacancy rate of units built 0% to 60% median family income	3%	3%	3%	3%	3%
Housing units opened that are newly affordable	511	804	828	500	500
Affordable housing units preserved	145	183	150	150	150
Rolling three-year average of total units opened and preserved	471	688	861	714	700
Average investment per rental housing unit	\$110,000	\$100,000	\$110,000	\$110,000	\$110,000
Percentage of housing units opened or preserved in high opportunity areas	73%	60%	50%	50%	50%
Percentage utilization of minority, women, and emerging small business contracts in housing construction (contract \$ awarded)	21%	20%	20%	20%	20%
Percentage utilization of minority contracts in housing construction (contract \$ awarded)	14%	12%	15%	15%	15%

Explanation of Services

The Multi Family Rental Project Financing program seeks to address, in-part, the City's housing crisis and the need for affordable rental homes. It also provides housing needs to the low-income households, earning 60% of the Area Median Income (AMI) or about \$48,840 for family of 4, and to very low-income residents earning 30% AMI or less, many of whom are at-risk of homelessness. Housing produced under this program are regulated for a minimum of 60 years (policy target 99 years). In addition, the restructures of regulated units retain the affordability and habitability of existing affordable housing projects.

This program provides the needed City investments to enable affordable housing projects to be developed by non-profit and for-profit partners. PHB financings, for the most part, are awarded through a Notice of Funding Availability (NOFA) to ensure that projects awarded with the City's subsidized funding are through a transparent, widely-accessible, public process. PHB issues 1-2 NOFAs each year and awards 5-10 projects for funding per year. Each NOFA will have specific requirements including a) the targeted population served, such as those at-risk of homelessness, b)

the income requirements including those at 0-30%, c) unit size and location and d) equity in contracting and in the program delivery.

PHB's funded portfolio is expected on average to have 20 requests for rehabilitation, restructures, and modifications each year; since each project is expected to require major rehabilitation or refinancing every 15-25 years. And as the affordable housing portfolio increases, requests of this nature are expected to increase. In some cases, restructures will require additional PHB funding as well as a new tax credit partnership. The PHB analysis and approval process is like that used for new construction projects.

FY 2018-19 continues to be an exceptionally busy year for PHB and this team with 26 projects in construction or in the development pipeline representing over 2,100 units which is over four times the annual production levels required under the 2035 Comp Plan.

Equity Impacts

It should be noted that all PHB programs seek to address equitable outcomes. In particular for this program, PHB development partners are required to report on their efforts to provide contracting opportunities to minority, women and emerging small business (MWESB), and must comply with federal and local low-income workforce utilization goals.

PHB has a well-documented history of supporting equity and inclusion in contracting. Since its inception, the Bureau has met or exceed the City of Portland's goal of 20% Disadvantaged, Minority, Women and Emerging Small Business (DMWESB) for construction sub-contracts. In July of 2016, PHB committed to a goal of 30% DMWESB participation by the year 2021 by implementing annual 2% target increases for all multi-family funded projects. Through a concerted outreach effort, the Bureau also has supported workforce training and hiring goals.

Of the 2100 affordable housing units in production, a total of 583 units or 27% (143 in construction and 440 in pipeline) are in the Interstate Corridor Urban Renewal Area subject to the N/NE Preference Policy which seeks to address historic displacement and the impacts of gentrification.

Changes to Program

It continues to be a pivotal time for the PHB for many reasons. First, the declaration of a continued housing emergency and the surge in resources; first from the increased allocation of the Tax Increment Financing (TIF) set-aside for housing in 2015, then the passage of the City's General Obligation (GO) Bonds in 2016. Most recently in 2018, the voters approved the Metro Bond and a constitutional amendment allowing the use of GO bond funds with more traditional affordable housing finance methods. The Bureau is already working through an extensive pipeline of new housing projects and the influx of additional funds is likely to lead to increased community expectations.

To meet the 2035 Comprehensive Plan goals, the Bureau has exceeded the Comp Plan production target of 500 newly affordable units a year and is on track to reach the overall goal of producing at least 10,000 new regulated affordable housing units on or before 2035.

In conjunction with the lack of affordability, cost of construction has skyrocketed, increasing at 8-12% per annum over the past 2-3 years, making the creation of new affordable units much costlier than previously projected and the impact of construction delays costlier.

Due to the increased level of homelessness and the need for permanent supportive housing (PSH), City Council sought to address this crisis by passing a resolution to provide 2,000 units of PSH units over the next 10 years. The City's efforts are a collaboration between the Bureau and the Joint Office of Homeless Services (JOHS) which has been working together to increase PSH units in affordable housing supported by Bureau funds for both development of units and services for those units.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
Capital Outlay	63,919,635	17,913,870	12,175,000	6,855,000
External Materials and Services	23,958,844	44,332,313	75,951,614	49,958,565
Internal Materials and Services	38,797	53,727	353,000	85,000
Personnel	749,240	675,206	1,372,094	966,829
Fund Expense				
Contingency	0	0	359,767	0
Debt Service	37,178,291	10,370,699	388,703	0
Fund Transfers - Expense	1,089,473	0	3,938,600	0
Ending Fund Balance	2,133,920	4,549,969	0	0
Sum:	129,068,200	77,895,785	94,538,778	57,865,394
FTE	5.42	5.62	7.03	6.84

Resources: The Multi Family Rental Project Financing program has a wide range of funding sources that pay for project financing and staff. Traditionally, the primary source has been the TIF housing set-aside that directs up to 45% of all TIF expenditures to affordable housing per City policy. Federal funds such as CDBG and HOME are another traditional source for multi-family project financing. Local funding has increased significantly in the last three years, with the City and County both contributing General Fund resources via the Housing Investment Fund (HIF). In addition, City Council added a Construction Excise Tax (CET) dedicated primarily to multi-family development.

TIF funds for multi-family housing are currently riding the crest of a wave of resources created by the increase in housing set-aside in 2015. As forecast by both the Bureau and Prosper Portland over the last few years, TIF funding will subside over the next four years as almost all districts reach maximum indebtedness or the final year to issue debt. That would leave CET as the only source of local funding (excepting bond resources, addressed in other program offers) to go along with federal sources (which have dwindled significantly from 15 years ago, but have stabilized more recently). While the emphasis on multi-family project financing will shift from this program to bond programs over the next five to seven years, by FY 2026-27 will be reliant other local funding sources to be placed to maintain this program at current levels.

Expenses: Almost all program expenditures are disbursements made as part of the financing package for multi-family affordable rental housing projects. PHB lends the resources listed above to make up a financing “gap” typically found with affordable projects. These gap funds cover the difference between the equity a project attracts and the money that can be borrowed against the project as part of the financing package.

For FY 2019-20, the amounts appropriated are either a) projects under construction, b) projects with a legal funding commitment, or c) projects for which funding has been awarded. The secondary cost is staffing costs for the team related directly to the packaging and oversight of the Bureau contribution to projects.

Staffing: Staffing for this program consists of 6.84 FTE (including an additional Senior Housing Loan Coordinator being added with existing resources), who spend an estimated 70% of time on developing new affordable rental housing and about 30% on restructuring and modifications of affordable housing projects. This team collaborates with other bureau staff and the City Attorney’s Office in getting project financing delivered. The same positions working in this program also are working on the bond programs.

Assets and Liabilities: This program finances capital assets owned by other non- governmental entities through loans. These assets are represented on the City’s financial statements by approximately \$438 million of gross loan receivables (for which the City holds a property lien), which is primarily soft debt, thus the net receivables are closer to \$60 million. The value received by the City by the difference in the gross and net figures is the approximately 400 properties with over 13,000 units developed using these loans. These assets, while not owned by the City, represent a significant and critical component in the affordable housing resources available to the residents of Portland.

Both PHB gap-financed and owned apartment buildings are required to have asset management plans and replacement reserves. For the gap financed projects, the bureau has an Risk Assessment and Compliance (RAC) team that reviews regulatory agreements for compliance with asset management requirements, grant funding requirements, and in some cases financial condition. In addition, physical condition inspections are done by construction coordinators as requested by the RAC team.

Program Information

Bureau: Portland Housing Bureau

Program Contact: Jill Chen

Website: <https://www.portlandoregon.gov/phb/74263>

Contact Phone 503-823-3339

Portland GO Bond Multi-Family Rental Housing

Program Description & Goals

In 2016 Portland voters approved Measure 26-179, Portland’s Housing Bond, which authorizes the City to issue up to \$258,400,000 in general obligation bonds for affordable housing. PHB plans to use the GO Bond proceeds to develop new affordable housing and purchase non-regulated occupied rental housing. The priorities and goals established by the bond’s Policy Framework are guiding how PHB identifies, purchases, builds and renovates homes. The policies and goals in place regarding how to use the bond funds are to:

- Build or acquire 1,300 or more affordable housing units, of which 650 of the bond funded units be “family-sized,” i.e. two or more bedrooms; and at least 600 units will be for households earning 30% or less of area median income (AMI), 300 may be supportive housing for households experiencing homelessness.
- Create access for Priority Communities, identified as:
 - Communities of Color;
 - families, including families with children, immigrant and refugee communities, families with foster children and intergenerational households; households experiencing homelessness or at imminent risk of becoming homeless; and households facing imminent displacement.
- Develop throughout the city, priority given to locations where there is: little or no existing affordable housing opportunities;
- high risk of gentrification, especially with large concentrations of communities of color; and good access to education, transportation, services, economic opportunities and green spaces.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
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Explanation of Services

At the time of passage of the authorizing Measure, Oregon’s Constitution prohibited GO Bond funds from being lent to artificial third-party entities, preventing the ability to utilize private ownership models and financing sources. The Portland Housing Bond program was originally designed in accordance with this restriction. This meant that projects had to be owned by a governmental entity, and that there were limited ways to leverage bond funds. PHB staff first implemented the program in the context of this reality, funds being used to acquire existing rental apartment projects and vacant land that will be redeveloped with affordable housing.

This model differs from the one typically used by PHB, where the Bureau lends resources to make up a financing “gap” typically found with affordable projects. These gap funds cover the difference between the equity a project attracts and the money that can be borrowed against the project as part of the financing package. Without the city’s gap financing, projects would not have sufficient funding to get built.

Equity Impacts

As with all PHB programs, the Housing Bond serves low-income people, many of whom are people of color and people with disabilities. For the Housing Bond properties, PHB has made a concerted effort to serve those with the highest needs, who may have barriers to access housing in the private market. For the Ellington and 10506 E. Burnside buildings PHB developed and implemented leasing programs specifically targeted to reach these communities. Aspects of the leasing program included:

- 0-30% AMI units – referrals through the Homeless Family System of Care (led by the nonprofit JOIN.) The family system is funded by the City/County Joint Office of Homeless Services.
 - o A subset of the 0-30% AMI units are dedicated as Supportive Housing, with wrap around services.
- 60% AMI units – when vacancies occur, property management sends out an “advance notification” to the community agency partner list. Agencies have a 14-day window to make referrals of eligible households. The list is comprised primarily of housing focused organizations serving culturally specific communities and homeless families.

All these organizations are either culturally-specific or have significant culturally-specific programs. In addition, PHB acquired the Westwind Apartments in part to ensure that the highly vulnerable tenants there were not displaced.

PHB has a well-documented history of supporting equity and inclusion in contracting. Since its inception, the Bureau has met or exceed the City of Portland’s goal of 20% Disadvantaged, Minority, Women and Emerging Small Business (DMWESB) for construction sub-contracts. In July of 2016, PHB committed to a goal of 30% DMWESB participation by the year 2021 by implementing annual 2% target increases for all multi-family funded projects. Through a concerted outreach effort, the Bureau also has supported workforce training and hiring goals.

Changes to Program

On November 6, 2018, voters changed the Oregon Constitution to allow for the lending of GO Bond proceeds for the creation of affordable housing. This is a notable change to the program that will mean that PHB can return to its typical public-private partnership model for the creation of affordable housing. This will also mean that PHB may reconsider the disposition and ultimate ownership of the properties already acquired under the Bond program.

PHB expects that by the first half of FY 2019-20 the planning for this potential transition will be complete. Regardless of the latitude the 2018 Constitutional Amendment provides, PHB is still bound to meet the goals laid out in the Framework and the original Measure. PHB expects that rather than the bureau creating the units as would have happened in the pre-Constitutional amendment environment, those obligations will be implemented by PHB’s partners.

PHB will lend some or most of the remainder of Housing Bond funds to private partners. PHB’s experience lending TIF and federal funds suggests that private partners will be able to leverage major sources of outside funding especially federal Section 42 Low Income Housing Tax Credit (LIHTC) equity and conventional construction/permanent debt. These sources can make up anywhere from roughly one-third to two-thirds of project financing. PHB expects this will stretch Housing Bond funds further.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	650,000
Internal Materials and Services	0	0	0	481,313
Personnel	0	0	0	553,710
Sum:	0	0	0	1,685,023
<hr/>				
	FTE	0	0	0
				4.25

Resources: Primary resources for this program are proceeds from the Housing GO Bond. Some bond related costs that are not bond reimbursable are paid from the Housing Investment Fund.

Expenses: The primary expenses of the program to date have been the acquisition of apartment properties. This acquisition activity will now shift to disbursements made as part of the financing package for multi-family affordable rental housing projects. The secondary cost is staffing costs for the team related directly to the packaging and oversight of the Bureau contribution to projects.

Staffing: Staffing for this program consists of 4.25 FTE (including a portion of an additional Senior Housing Loan Coordinator being added with existing resources), who collaborate with other bureau staff and the City Attorney's Office in getting project financing delivered. The same positions working in this program also are working on the Multi Family Rental Project Financing program.

Assets and Liabilities: A number capital assets have been purchased to date through the Portland Housing Bond program, through a combination of the Housing GO Bond, the Short-term Rental Revenue Bond, interim borrowing, TIF and Housing Investment Fund sources. These assets include the following apartments:

- The Ellington
- East Burnside
- The Westwind

Other assets include property planned for future development:

- 30th and Powell
- Mt Tabor
- The Joyce
- NE Prescott

As aging existing apartment properties, the Ellington and Westwind have significant future major maintenance expenses. Property management costs for all properties can be found in the Property Management program offer, along with further discussion of asset and liability issues for these properties.

Program Information

Bureau: Portland Housing Bureau

Program Contact: Karl Dinkelspiel

Website: [https://www.portlandoregon.gov/
phb/74262](https://www.portlandoregon.gov/phb/74262)

Contact Phone 503-823-1354

Property Management

Program Description & Goals

PHB currently owns 15 pieces of real property. Properties fall into four categories: land leases for affordable housing development; housing owned by the Bureau; properties under development; and properties planned for future development.

- Land Leases: Three properties are land under long term (up to 99 years) ground leases for affordable housing development. Lessees are responsible for operations and maintenance of the land.
- Housing Bureau Owned Properties: The Housing Bureau owns five rental properties – the Fairfield, the Ellington, 105 E Burnside, the Westwind and the Headwaters. Home Forward asset manages these buildings on PHB’s behalf.
- Properties under active development: Two properties are under active development by PHB – a new development at 30th & SE Powell, and the Joyce Hotel renovation and rehabilitation. PHB is responsible for the property management for these parcels.
- Properties for future development: The bureau owns five properties which will be available for future affordable housing development on varying timelines due to current occupancy – 5020 N. Interstate Ave., 5827 NE Prescott, 60th & Belmont, 102nd & E Burnside, and Carey Boulevard Property.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
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Explanation of Services

PHB has a number of responsibilities and requirements as a result of owning property which fit into two broad categories: day-to-day property management and longer-term asset management. Property management includes such activities as tenant services, leasing, maintenance, security and vendor contracting. Properties slated for future development are managed by PHB staff. PHB has leveraged the capacity and expertise of Home Forward to asset manage its occupied rental properties.

Equity Impacts

In keeping with PHB’s broader mission, the property management/asset management program supports the provision of affordable housing either through direct ownership of property or through leasing of property to mission-based partners. PHB requires that all units are made available to households earning 60% AMI or less. Disproportionately, these are households of color or households with disabilities. PHB’s selection criteria for partners typically include an emphasis on culturally specific services and/or outreach during lease-up. PHB actively assists non-culturally specific partners in creating and fostering partnerships that help disadvantaged communities.

Changes to Program

Prior to 2016, PHB properties were asset managed by Prosper Portland under the terms of an IGA. From 2016 to 2018 PHB managed its own properties. In 2018, recognizing the bureau lacked capacity to asset manage its expanding real property assets, PHB entered into an IGA with Home Forward to provide asset & property management services.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	98,302	408,506	3,852,093	5,583,517
Internal Materials and Services	14,206	-12,185	56,928	165,472
Personnel	0	64,036	182,133	7,099
Fund Expense				
Contingency	0	0	2,750,222	314,418
Debt Service	0	0	2,097,197	712,750
Fund Transfers - Expense	0	0	15,000	0
Sum:	112,508	460,358	8,953,573	6,783,256
FTE	0	1.57	0.22	0.06

Resources: Acquisition of these properties utilized many funding sources: TIF, HIF, various bond proceeds, and interim financing. Operations and maintenance of the properties is covered primarily by property income (rents); though holding costs for a couple are covered by TIF, and the bureau is subsidizing two others from HIF sources. In FY 2019-20, one-time and ongoing funds were added support drug and alcohol treatment services as part of permanent supportive housing services.

Expenses: Current expenses are the operations and maintenance of the properties. These expenses can include major maintenance items that are not capitalized.

Staffing: PHB has spread staffing responsibility for this program among the Affordable Rental Housing, Bond and Business Operations teams. This consists of approximately 0.06 FTE dispersed over a number of individual staff.

Assets and Liabilities: These property assets have a value of approximately \$90 million. These properties vary in need from major rehabilitation to major maintenance to construction. Newer properties like the East Burnside and Headwaters apartments have time to build maintenance reserves, while older properties like the Ellington may need additional financing to address major maintenance issue. Both Housing Bureau gap-financed and owned apartment buildings are required to have asset management plans and replacement reserves. For PHB-owned buildings, property management contractors are required to provide multi-year capital needs assessments for review by bureau staff, and Home Forward advises on proper replacement and capital reserve amounts.

Program Information

Bureau: Portland Housing Bureau

Program Contact: Karl Dinkelspiel

Website: <https://www.portlandoregon.gov/phb/26428>

Contact Phone 503-823-1354

Homeowner Access Programs

Program Description & Goals

The Portland Housing Bureau’s (PHB) Homeowner Access program invests in services to assist families, particularly from communities of color, access homeownership. Support for low income, first-time homebuyers includes pre-purchase education and counseling as well as down payment assistance programs. Services are administered by PHB’s Neighborhood Housing Program (NHP) staff along with partnerships with nonprofit community service providers.

Through the following program service delivery models, the goals of the Homeowner Access program include, but are not limited to - increasing the number of new homebuyers, addressing racial homeownership disparities, providing generational wealth creation opportunity, prioritizing households and families displaced by gentrification and improving financial stability for City of Portland residents. The following service delivery models make up the Homeowner Access Program.

- Homeownership education and counseling
- Down payment assistance (DPA)
- Homeownership development

Homeownership education and counseling services are provided by HUD Certified Community Partners by way of sub recipient contracts with the Bureau. Culturally specific educational courses are provided to households working towards purchasing a home, along with one-on-one counseling that provides case-by-case analysis of the household’s unique circumstances with support through the entire homeownership process. Partnerships with non-profits create additional opportunities for homebuyers to access additional programs and leverage other resources that have proven beneficial in becoming a successful homeowner.

Down Payment Assistance (DPA) loans and grants are administered directly by PHB staff, and act as a means by which the Bureau impacts housing affordability, with a subsidy that reduces the costs of the home purchase, therefore reducing the monthly financial obligations to the household. DPA has proven to be an essential tool in providing access to affordable homeownership opportunities and support permanent affordability.

FY 2017/18 and 2018/19 resources for DPA in the Interstate Urban Renewal Area (URA) have been dedicated to new homeownership development initiatives to address the City’s increased housing prices and low housing stock.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of households receiving homebuyer education or counseling	975	1,169	975	975	975
Percentage of households receiving homebuyer education or counseling and subsequently purchasing a home	15%	13%	10%	10%	10%

Explanation of Services

Creating additional homeownership opportunities is one of a few tools necessary to support the housing continuum, providing a pathway from homelessness to homeownership options in the market. Renters have been faced with increasing rents and rising living costs, while incomes haven't met that same level of growth – homeownership provides a stabilized, long term affordable housing option.

In a very competitive and tight housing market, creating new homeowners continues to be a challenge; however, homeownership counseling and education through reputable and trusted community partners help to 1) identify residents with a desire to improve their financial wellbeing and 2) provide necessary education that is culturally appropriate, based on the various history and views of Portland residents.

DPA subsidies are available in the form of a forgivable loan to first time homebuyers at or below 100% AMI. Total per household subsidies have recently increased in the Interstate URA to \$100,000 to address the higher priced market in the area, which necessitates a greater subsidy to allow families who make 100% of median family income purchase homes in the area. The total DPA subsidy for other area of the City are capped at \$80,000 per household. TIF resources require that 20% of the subsidy are designate for use as a Home Improvement grant to be used within 6 months of closing.

In 2018, City Council approved new DPA guidelines which allow for loan forgiveness. Under the DPA loan forgiveness structure, 50% of the original loan amount is forgiven on the 15th anniversary of the original loan note. Three percent of the original loan amount will be forgiven annually on the anniversary date of the original loan note, starting year 16 and continuing until year 29. At the end of year 30, any remaining balance will be forgiven. A home sale or refinance prior to year 30, will require a payoff of any remaining balance on the loan.

Equity Impacts

Communities of color continue to face significant challenges in becoming homeowners; factors such as limited to no generational wealth, impacts from generations of disinvestment in communities resulting in credit and debt challenges, and most importantly communities of color continue to earn less than their white counterparts here in Portland and Multnomah County. The Homeowner Access Program's main goal is to assist low income and people of color to become homeowners through counseling assistance and down payment assistance. PHB contracts with several culturally specific organizations to provide both counseling and the down payment assistance programs.

Down payment assistance is necessary in addressing the homeownership disparities, and policies should improve access and lessen challenges and barriers in obtaining resources.

Changes to Program

In December 2017, Council unanimously approved the Home Purchase Assistance Program (HPAP). HPAP provides assistance that is directly funded by the first mortgage lender. The lender is reimbursed for the assistance, which is wrapped up in a silent second loan (forgiven pro rata over 10 years), by selling them to a third-party program administrator, George K Baum (GKB). The lender is also reimbursed for the 1st mortgage by selling it to either their Servicer or Freddie Mac directly. The Freddie Mac piloted program allows for a 1% fee (of the purchase price) to be charged on each loan. This fee is split 50/50 between PHB and GKB. PHB pays for staff time related to managing the program, however the program may generate revenue that can be used for Housing Bureau programming. This is a program that is new to the Neighborhood Housing list of services.

PHB Interstate TIF homeownership financial assistance is subject to the Preference Policy Potential homeowners must be identified through the PHB Preference Policy to gain access to Down Payment Assistance (DPA) resources in the ICURA. This creates a significant challenge in reaching the homeownership goals stated in the N/NE Neighborhood Strategy plan, as PHB and community partners work to serve and prepare marginalized communities which have decades of disinvestments.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	1,734,400	1,885,767	8,546,959	3,777,848
Personnel	56,195	161,295	122,600	235,715
Sum:	1,790,595	2,047,062	8,669,559	4,013,563
FTE	0.66	0.93	1.67	1.85

Resources: Funding sources for Homeowner Access Programs include federal funds (Community Development Block Grant, which has income and usage limitations); and Tax Increment Financing (TIF) in the Lents and Interstate urban renewal districts (which are limited by location to the districts and require a small construction component).

Expenses: As some of these programs involve direct service, staffing costs as a ratio of funds disbursed to citizens tend to be higher than multifamily programs. But funds disbursed via subrecipient contracts and loans are still the primary expense of the program.

Staffing: The different service delivery models require different skill sets within the team. Subrecipient contract with community partners require contract development, management, and monitoring. DPA loans require coordination with community partners to identify potential buyers, income qualification and loan origination, and where a home improvement grant is paired with a DPA loan, construction coordination. There are 1.85 FTE dedicated to this program.

Assets and Liabilities: This program assists in financing the acquisition of homes by citizens, owned by those citizens through DPA loans. These are deferred payment loans, but the bureau holds liens on the properties, and loans are due upon change of occupancy. For loans originated after 2015, the forgiveness model described under explanation of services is in effect. Data indicates that many loans are paid off within the first 15 years, though since the DPA program is barely 15 years old, that trend will need to be monitored. The value received by the City for those loans not yet paid off is the benefit of a new homeowner, which represents a significant and critical component in the affordable housing resources available to the residents of Portland.

Program Information

Bureau: Portland Housing Bureau

Program Contact: Dana Ingram

Website: <https://www.portlandoregon.gov/phb/74630>

Contact Phone 503-823-2375

Homeowner Retention Programs

Program Description & Goals

Homeowner Retention programs are City investments available to assist families, particularly from communities of color, retain homeownership. Through direct loan origination and sub-recipient contracts, homebuyers receive post-purchase education and counseling as well as grants and loans.

The program serves to prevent displacement of long-time community residents by helping current homeowners retain their homes through home repair programs, foreclosure prevention counseling, and retention services. Funding for home repair grants and loans helps current low-income, vulnerable homeowners maintain their homes safely. Grant and loan programs are meant to improve the condition of existing housing and address the impact that housing conditions can have on health and safety. Lead remediation and healthy homes programs include administration of federal funds to reduce lead-based paint and environmental health hazards in homes with young children or vulnerable elderly occupants.

Loans (administered by PHB) and grants (community partners) aim to help older adults and people with disabilities retain and live safely in their homes through home repair assistance.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of households receiving home repairs	586	721	800	600	600
Percentage of households receiving home repairs and retaining their homes 12 months after services	88%	80%	80%	80%	80%

Explanation of Services

Homeowners in the City of Portland are experiencing poor property conditions resulting from deferred maintenance and long-term residents have experienced rapidly increasing property taxes. Elderly residents are at risk of displacement when incomes are reduced, and medical expenses are increased, finding it more difficult to age in place and pass on generational wealth.

New homeowners are stretched to afford home purchases in the City, therefore post purchase counseling, fix it fairs, financial fitness workshops, etc., provide the support and information to help homeowners maintain their homes, and provide proactive resources, and set expectations.

Home Retention Case Management services aim to preserve homeownership and prevent foreclosure. The program is available for new and longtime homeowners at or below 80%AMI, and provide support, counseling and referral services. NHP is working to enhance and build upon existing relationships with other bureaus such as Bureau of Development Services (BDS) to address housing code violations. Recently, \$200,000 was set aside to enhance the program's effectiveness, to provide additional services such as estate planning, loan modification counseling, financial planning, etc.

Foreclosure Prevention Counseling services offered through two nonprofit culturally specific agencies provide HUD-approved housing counselors available to assist in avoiding foreclosure.

Home Repair Grants utilize Bureau funding to support Community Partners with outreach,

administration, and direct operational expenses. Homeowners receive small grants to address critical needs, health and safety issues, such as weatherization materials, accessibility features, wheelchair ramps, etc., and addresses BDS fines. These services are delivered through 8 nonprofit community organizations through sub-recipient contracts with the following resources: Tax Increment Financing (TIF) in the Interstate and Lents Urban Renewal Areas (URA's) and N/NE resources, General Fund (GF), and Community Development Block Grant (CDBG) (limited to \$5,000). On average, homeowners receive a grant amount of approximately \$2,000. Home repair grant partners provide these services to homeowners below 80% AMI, with a target of servicing households at 50% AMI and lower.

In cases where a grant doesn't cover the necessary repairs, Home Repair Loans, are available for homeowners in the City; administered by PHB's NHP Loan Coordinator. Home Repair loans are capped at \$40,000 per home, have an income limit of 80%AMI.

PHB will continue to administer Prosper Portland N/NE Community Development Initiative resources to help moderate income households (80% AMI to 120% AMI) purchase and retain homes within the Interstate Urban Renewal Area.

Equity Impacts

Through several activities, PHB assists low income minorities and seniors stay in their homes, for example, by funding foreclosure prevention, and a new program to provide case management to assist families in keeping homes within the family. Additionally, PHB funds home repair grants and loans, and lead remediation for families with children under the age of six.

Changes to Program

A change for FY 2018-19 was a reprogramming of \$200,000 in CDBG to enhance the effectiveness of the program goals of homeowner retention to provide services like estate planning and financial fitness for home repair loan/grant clients. NHP staff is currently working to design the programs structure with community input. A limited-term was added during FY 18-19 to assist with program workload.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	3,538,899	3,597,335	3,164,729	8,406,033
Internal Materials and Services	0	0	0	59,800
Personnel	305,112	484,202	579,573	895,701
Sum:	3,844,011	4,081,537	3,744,302	9,361,534
FTE	3.59	5.57	4.1	7.85

Resources: Funding sources for the Homeowner Retention Programs include federal funds (Community Development Block Grant, which has income and usage limitations, and the Lead Pant Hazard Control grant); and Tax Increment Financing (TIF) in the Lents and Interstate urban renewal districts (which are limited by location to the districts).

Expenses: As some of these programs involve direct service, staffing costs as a ratio of funds disbursed to citizens tend to be higher than multifamily programs. But funds disbursed via subrecipient contracts and loans are

still the primary expense of the program.

Staffing: The different service delivery models require different skill sets within the team. Subrecipient contracts with community partners require contract development, management, and monitoring. Home Repair loans require marketing in the community, income qualification and loan origination, and construction coordination. There are 7.85 FTE dedicated to this program, including the addition of a limited term construction coordinator with existing resources.

Assets and Liabilities: This program assists in financing the repair of homes for citizens. These are deferred payment loans, but the bureau holds liens on the properties, and loans are due upon change of occupancy. Data indicates that many loans are paid off within the first 15 years. The value received by the City for those loans not yet paid off is the benefit of a homeowner remaining in their home, which represents a significant and critical component in the affordable housing resources available to the residents of Portland. Additional assets belonging to the program are equipment used in field testing for the federal Lead-Paint Hazard Control (paid for with grant funding), which are on a regular maintenance and replacement schedule.

Program Information

Bureau:

Website: <https://www.portlandoregon.gov/phb/74652>

Contact Phone 503-823-2375

Rental Services Policy and Planning

Program Description & Goals

The Rental Services Policy and Planning Program is responsible for data analysis, policy development, and regulation related to fair housing and landlord-tenant law. The program works to develop and implement policy and regulation associated with landlord-tenant and fair housing law. This work includes research, data analysis, and policy development as directed by the Housing Bureau Director, Commissioner-in-Charge, and City Council; staff support to the City’s Rental Services Commission and Fair Housing Advocacy Committee; technical assistance for the public to get information and assistance with local landlord-tenant law requirements; administration of the city’s mandatory relocation assistance exemption process; and, administration of the city’s rental unit registration requirement. There are no program-specific performance measures associated with this program offer.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
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Explanation of Services

Over 46% of households in Portland are renters, and renter households are disproportionately low-income or from Communities of Color. When compared with similar jurisdictions across the nation, or the homeownership market, the rental housing market in Portland, and Oregon, is largely missing a modern regulatory framework to maintain a healthy market for both renters and landlords. Renters are experiencing higher rates of displacement due to rising cost of rent and stagnant incomes, and this displacement has created a need for the city to address and modernize its services and regulations.

This program is one of two associated with the Rental Services Office; the city’s landlord-tenant and fair housing organization. This program exists to develop and implement policy and regulation associated with landlord-tenant and fair housing law. Some initiatives are consistent year-to-year, but as new initiatives are identified by City Council, the Commissioner-in-charge, or the bureau, they are assigned based on workload and expertise.

This program is responsible for leading the coordination and implementation of Rental Services Office workplan and projects, along with the policy and planning associated with the Fair Housing Advocacy Committee, contract management, rental unit registration, and other high-priority initiatives. Other responsibilities include contract management and mandatory relocation assistance. Moreover, this program is responsible for data analysis, pilot program development and evaluation, and national research and comparative analysis. Other day to day functions of the program are rental registration technical assistance and administrative processing.

The results of the program offer include increased knowledge and understanding of rights and responsibilities for landlords and renters under landlord-tenant and fair housing law; administrative processing of mandatory relocation assistance exemptions and payments; a complete registration of rental units; Tenant-Landlord services contracts; and successful development of policies and regulations as directed by City Council.

Equity Impacts

The Rental Services Policy and Planning Program focuses services on individuals from underserved communities who have barriers to housing and opportunity. This includes having an intentional focus on reaching Communities of Color, immigrant and refugee communities, people with limited English proficiency and individuals with disabilities. Education services are provided in a culturally-responsive manner and several sub-contractors provide culturally-specific rental services. Data is collected and reported on a quarterly basis and is disaggregated by race and ethnicity. Program staff analyze data to determine issues and opportunities for improvement to advance more equitable access and outcomes.

Changes to Program

Increasing rents and stagnant incomes for renter households have led to an increase in displacement and an increased demand for technical assistance from the city's low-income renters and Communities of Color. In addition, as City Council has adopted new landlord-tenant regulations there has been an increase in the need for technical assistance and administrative process from renters and landlords.

In the current, 2018-2019 fiscal year 2.0 FTE are funded with one-time general fund. Without continued funding for these staff, the Rental Services Office staff will be reduced by 2.0 FTE, or 40%. These 2.0 FTE provide technical assistance to the public on landlord-tenant law and process exemptions for mandatory relocation assistance. Losing these staff will require the bureau to eliminate these services or cut other services to redirect existing staff.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	160,000
Personnel	0	0	0	246,278
Sum:	0	0	0	406,278
<hr/>				
FTE	0	0	0	2.04

Resources: The program is funded from primarily General Fund, with some CDBG resources.

Expenses: Program expenses are primarily salaries and benefits for policy and planning staff, as well as payments for consulting, meeting space and materials, printing and distribution, etc.

Staffing: This program offer includes 2.04 FTE. Staff are assigned a portfolio of policy and planning issues (see explanation of services section) and are responsible for the associated work products.

Assets and Liabilities: N/A

Program Information

Bureau: Portland Housing Bureau

Program Contact: Kim McCarty

Website: <https://www.portlandoregon.gov/phb/72622>

Contact Phone: 503-823-5312

Tenant and Landlord Programs

Program Description & Goals

The Tenant-Landlord Program is responsible for services related to fair housing and landlord-tenant law, managing contracts for services with community-based organizations. These services include education and training, legal assistance, fair housing testing, emergency referral services, and emergency relocation assistance for health and safety. A primary focus of these contracted services is to provide access to information about rights and responsibilities, so renters can overcome knowledge and resource barriers to quickly get their housing needs met and barriers resolved. If education services are insufficient, case management and legal assistance are available for issues including eviction, harassment, discrimination, reasonable accommodations.

Measure Title	PM 2016-17 Actuals	PM 2017-18 Actuals	PM 2018-19 Target	PM 2019-20 Target	Strategic Target
Number of renter clients who were provided information and referrals	1,947	2,602	2,250	2,250	2,250
Average number of monthly referrals to affordable housing with OneApp Oregon Application	N/A	408	400	400	400
Number of renter clients provided direct services	371	793	605	605	605

Explanation of Services

Over 46% of households in Portland are renters, and renter households are disproportionately low-income or from Communities of Color. When compared with similar jurisdictions across the nation, or the homeownership market, the rental housing market in Portland, and Oregon, is largely missing a modern regulatory framework to maintain a healthy market for both renters and landlords. Renters are experiencing higher rates of displacement due to rising cost of rent and stagnant incomes, and this displacement has created a need for the city to address and modernize its services and regulations.

The Tenant-Landlord Program supports education and legal services that are provided through community-based contractors with expertise in landlord-tenant and fair housing law.

Education services include: hotlines for landlord-tenant and fair housing law; community trainings and technical assistance provided by culturally specific organizations; community workshops provided by legal assistance organizations; targeted education and training interventions provided by renter’s rights organizations; and other activities. Education is offered in a variety of formats including self-advocacy coaching, letter writing clinics, policy committees, and other interventions from legal and non-legal professionals on behalf of renters seeking assistance.

Legal services include: case management and referral services provided by culturally specific organizations and renter’s rights organizations; legal assistance and representation provided by landlord-tenant legal assistance agencies and fair housing organizations; fair housing testing and enforcement provided by legal assistance and fair housing organizations; and other activities.

The results of the program include increased knowledge and understanding of rights and responsibilities for landlords and renters under landlord-tenant and fair housing law; resolutions to disputes between landlords and tenants; stabilized housings and the prevention of displacement; and the stable relocation to new housing.

Equity Impacts

The Tenant and Landlord Program focuses services on individuals from underserved communities who have barriers to housing and opportunity. This includes having an intentional focus on reaching Communities of Color, immigrant and refugee communities, people with limited English proficiency and individuals with disabilities. Education services are provided in a culturally-responsive manner and several sub-contractors provide culturally-specific rental services. Data is collected and reported on a quarterly basis and is disaggregated by race and ethnicity. Program staff analyze data to determine issues and opportunities for improvement to advance more equitable access and outcomes.

Changes to Program

Increasing rents and stagnant incomes for renter households have led to an increase in displacement and an increased demand for education services and legal services from the city's low-income renters and Communities of Color. Additionally, as an increasing priority for City Council, the demands and expectations of the program have increased.

Funding for service contracts has nearly doubled in the last two fiscal years, but the increased level of service has been funded with primarily one-time funding. The FY 2019-20 Budget includes one-time resources to maintain current service levels for contracts for outreach, education, and legal services, two existing positions, and a new Rental Services Office program manager. Furthermore, there is additional funding for a mediation services pilot program to help resolve tenant and landlord disputes as an alternative to eviction, and additional funding from one-time Recreational Cannabis Tax resources for records expungement for communities disproportionately impacted by cannabis prohibition.

Program Budget

	FY 2016-17 Actuals	2017-18 Actuals	2018-19 Revised	2019-20 Adopted
Bureau Expense				
External Materials and Services	0	0	0	1,530,700
Internal Materials and Services	0	0	0	4,000
Personnel	0	0	247,173	397,940
Sum:	0	0	247,173	1,932,640
FTE	0	0	2.5	3.5

Resources: The program is funded from both CDBG funding and General Fund ongoing and one-time resources. In FY 2019-20, the budget includes one-time resources to maintain current service levels for contracts for outreach, education, and legal services, two existing positions, and a new Rental Services Office program manager. In addition, there is funding for a mediation services pilot program to help resolve tenant and landlord disputes as an alternative to eviction. Also, there is additional funding from one-time Recreational Cannabis Tax resources for records expungement for communities disproportionately impacted by cannabis prohibition.

Expenses: Program expenses are primarily staff and contract payments for education and legal services. Staffing costs are associated with management of the contracts and operating the Relocation Assistance activity.

Staffing: This program offer includes 3.5 FTE. Staff operate the Relocation Assistance activity, and manage numerous Fair Housing, legal assistance, education and outreach contracts.

Assets and Liabilities: N/A

Program Information

Bureau: Portland Housing Bureau

Program Contact: KimMcCarty

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