

Bureau Baseline Template

1 — Overview: Portland Housing Bureau

Commissioner-in-Charge: Nick Fish
Commissioner's Liaison: Daniel Ledezma
Bureau Director: Margaret Van Vliet
Assistant Director: Jacob Fox
Strategic Policy Mgr: Andy Miller
Business Ops Manager: Alissa Brumfield
FPD Analyst: Claudio Campuzano
Org Chart: tinyurl.com/ycfb62f
BAC Roster: tinyurl.com/yat9ahz

3 — External Trends:

Positive/Strengths

1. Emphasis in the Obama administration on affordable housing, equity, and sustainable development is good match for our agenda.
2. Measures 66 & 67 preserved funding for social services on which many PHB projects rely.
3. Housing market weakness putting more properties within reach of non-profit, mission based developers and first-time homebuyers.

Negative/Weaknesses

1. High local unemployment contributing to record levels of family homelessness.
2. Lending guidelines have become much more conservative, making it more difficult to leverage private capital for development.
3. Tax credit market weakness has increased gap government must finance to further affordable housing development projects.

Internal Trends:

Positive/Strengths

1. TIF Affordable Housing Set-Aside has provided close to projected amount of new resources for affordable housing development.
2. Following Nov-09 co-location, PHB has begun to streamline operations & reduce redundancy.
3. Working to redesign tax abatement process to create a comprehensive, fact-based program.

Negative/Weaknesses

1. Housing crisis has challenged PHB efforts to increase equity in minority homeownership.
2. New federal eligibility requirements may prevent PHB from funding Unlimited Choices, a popular program that retrofits private & multi-family residences to improve accessibility.
3. Resources to pay for resident services, operations, and services to assist tenants to remain housed are limited.

2 — Guiding Statements:

Slogan: N/A
Mission: Creating home for Portlanders by influencing the larger livability agenda, and delivering housing investments and services to fill market voids.
Vision: Portland Neighborhoods that are safe, attractive, complete and inclusive
Values: Equity; stewardship; integrity; employees; and collaboration

About Us: tinyurl.com/y9ksvmf & tinyurl.com/ybwtuqt

More: Complete vision/values at:
tinyurl.com/yz8n6br
 Bureau webpage at:
portlandonline.com/phb

4 — Titles of Three Most Recent Audits & Summary of Recommendations Implemented:

1. **Housing Tax Abatements: Oversight inadequate to ensure program goals met** – 5 recommendations. 3 complete. 2 in process.
2. **Ending Homelessness: Many Short term Goals met; Now long-term success should be defined** – 3 recommendations. 2 complete. 1 in process.
3. **A Review of the Efforts and Accomplishments of City Housing Programs: 1996-2000** – 5 recommendations (to PDC). Consolidated bureau is addressing through transition & integration process.

5 — Trends:

Comparisons to other cities: Since 2000, both housing prices and rents in Portland have increased more than incomes. The result is that more households (rental and homeowner) are “cost burdened,” (i.e., pay a greater portion of household income for housing than the 30% considered acceptable.)

Cost Burdened Households 2007 (Portland vs. Nation)		
	Portland	Nation
Paying < 30% household income	55%	64%
Paying > 30% household income	45%	36%

Major Org/Budget Changes (last 2 years):

- Creation of Portland Housing Bureau. Integration of operations, staff, cultures and strategies.
- Attempts to shift from reliance on one-time general funding to ongoing resources.

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6 - Budget Summary Info:

Bureau Program Expenditures	Current Revised FY 2009-10 Budget	Requested FY 2010-11 Budget without cuts or adds	Requested FY 2010-11 cuts	Requested FY 2010-11 add packages
Operating	62,884,130	104,773,223	(246,695)	4,218,400
Capital				
TOTAL	62,884,130	104,773,223	(246,695)	4,218,400
Authorized Positions	34.00	75.00	0.00	(1.00)

7 - Labor/Management/Administration:

1. **% spent on admin:** Not required req. budget
2. **Total FTE:** 75 (incl. 2.0 limited-term FTE)
3. **Average management span of control:**
 - 4.4 (61 staff: 14 managers)
4. **List of Bargaining Units and number of bureau members:**
 - **AFSCME** - 4.0 FTE; transition of largely unionized PDC staff transfer to city on 7/1/10; union status post-transfer is unknown.

8 - High Level Performance Measures:

1. Over past 5 years, we have built:
 - a. 2,500 rental units affordable for 0-60% MFI
 - b. 2,610 homeownership units
2. Over past year:
 - a. 1,396 owner-occupied home repairs performed
 - b. 1,522 persons served in shelters
 - c. 691 households served in transitional housing
 - d. 79% households receiving eviction prevention rent assistance retained housing at 12 months
 - e. 718 households residing in permanent supportive housing
 - f. 1,465 clients attended homeownership classes
 - g. 405 clients purchased a home

9 - Awards/Recognitions:

1. Mar-09 – Recipient MacArthur Foundation Award for State and Local Preservation Leaders (with OHCS)
2. Sep-09 – HUD Lead Hazard Demonstration Grant (\$4.3M over 3 years)
3. PHB homeless services providers received numerous awards, including:
 - **Human Solutions** - Bank of America Neighborhood Excellence Initiative Award
 - **Central City Concern** - 2009 Oregon Psychiatric Association Access Award for providing mental health services to the uninsured
 - **JOIN** - 2008 Lowenstein Trust Award

10 - Major Projects FY 2009-10:

Policy/Operational Projects (top 5)

1. Develop strategic plan that includes performance based outcomes including goals and outcomes specific to equity. Will also result in a dashboard or report card that will allow decision makers, stakeholders and tax payers to better understand PHB and the outcomes being achieved.
2. Assess Homeownership programs to ensure they complement and enhance non-PHB efforts and programs working to close the minority homeownership gap.
3. Assess and enhance communication, customer service and effectiveness by and between the functions of housing development finance, asset management and loan servicing.
4. Continue projects to implement 10-year plan to end homelessness and complete a mid-point five year assessment of efforts and investments.
5. Assess and enhance all forms of internal and external communication strategies and tools.

Capital/Infrastructure Projects (top 5)

**Note: these projects are not creating city asset*

1. [River District] Homeless Resource Access Center
2. [River District] Pearl Housing
3. [North Macadam / So. Waterfront] Block 49
4. [Interstate] Killingsworth Block
5. [Interstate / Lents] Scattered site rehab and disposition

Major Maintenance Projects (top 5)

N/A

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<p>11 — Major Projects – Out Years</p> <p>FY 2010-11:</p> <p>Policy/Operational Projects (top 6)</p> <ol style="list-style-type: none"> 1. Track results against 10-Yr Plan to End Homelessness and efforts to close the minority homeownership gap. 2. Increase number of programs that issue RFP's for contracts that result in more effective outcomes as outlined in PHB's strategic plan. 3. Establish a comprehensive communications plan to address branding, key messages, social media and internal communications. 4. Establish PHB accomplishments/outcome dashboard. 5. Conduct organizational development activities to benefit the employees of PHB. 6. Enhance budget development to be more inclusive of employees and broad range of stakeholders. <p>Capital/Infrastructure Projects (top 3)</p> <ol style="list-style-type: none"> 1. [Citywide] Issue competitive RFP for rental housing and home ownership development that result in the maximum # of units developed/preserved. 2. [Citywide] Issue competitive RFP for home ownership development that result in maximum # units developed. 3. [Citywide] Partner with borrowers & key stakeholders to develop preservation plan for affordable housing properties most in distress. <p>Major Maintenance Projects (top 3) - N/A</p> <p>FY 2011-12:</p> <p>Policy/Operational Projects (top 2)</p> <ol style="list-style-type: none"> 1. Increase supply of affordable & PSH housing through new construction and preservation, as well as collaboration with other public funders on service funding commitments. 2. Track results against 10-Yr Plan to End Homelessness and efforts to close the minority homeownership gap and open the Resource Access Center. <p>Capital/Infrastructure Projects (top 2)</p> <ol style="list-style-type: none"> 1. [Citywide] Issue competitive RFP for rental housing and home ownership development that result in the maximum # of units developed/preserved. <p>Major Maintenance Projects (top 2) - N/A</p> <p>FY 2012-13:</p> <p>Policy/Operational Projects (top 1)</p> <ol style="list-style-type: none"> 1. Increase supply of affordable and PSH housing through new construction and preservation. <p>Capital/Infrastructure Projects (top 1)</p> <ol style="list-style-type: none"> 1. [Citywide] Issue competitive RFP for rental housing and home ownership development to result in maximum # units developed/ preserved. Coordinate with OHCS to maximize coordination with funding cycles. <p>Major Maintenance Projects (top 1) - N/A</p>	<p>12 - Sustainability Goals – SOCIAL</p> <ol style="list-style-type: none"> 1. SEA-related: N/A (PHB not in SEA FY 2009-10) 2. Bureau Employee Composition: <ul style="list-style-type: none"> ▪ % of minorities: 24% ▪ % of female: 60% 3. M/W/ESB Contracting: PHB goal - Award 30% of contracts and funds to minority and women business enterprises (MBE's & WBE's) 4. Customer survey/polling results: PHB has not completed customer survey in last two years. Business operations team to conduct during calendar year 2010. However, bureau maintains continuous customer service improvement focus. <p>13 - Sustainability Goals – ECONOMIC</p> <ol style="list-style-type: none"> 1. Efficiency improvements: PHB/PDC housing operations integration has improved communication, coordination and awareness internally. Also, PHB has dramatically improved contract and invoice processing turnaround (invoice & contract processing reduced by > 50%) 2. Summary of Major Assets Managed: PDC housing assets to be transferred effective July 1, 2010. Comprehensive portfolio analysis in process. <p>14 - Sustainability Goals – ENVIRONMENTAL</p> <p>Sustainability Plan: tinyurl.com/ycumto8 Latest Report: tinyurl.com/yzdrpnj</p> <p>Summary of Highlights: PHB is committed to sustainability. Latest report highlights energy efficiency and paper/waste reduction. Going forward, bureau "Green Team" committee is active and has full support of bureau management.</p> <p>15 - Key Policy & Planning Documents:</p> <p>Strategic Plan:</p> <ol style="list-style-type: none"> 1. Strategic Plan – tinyurl.com/yekq7n3 (Note: PHB to commence strategic plan process in 2010) 2. Five Year Consolidated Plan - tinyurl.com/yaqvtgg <p>Portland Policy Documents (Top 3):</p> <ol style="list-style-type: none"> 1. Ten Year Plan to End Homelessness tinyurl.com/yd9sek9 2. TIF Affordable Housing Set Aside Policy tinyurl.com/yfe6tr5 3. HOME Minority Home Ownership Report tinyurl.com/yk2swa4
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16 — List of Bureau Programs: (each line limited to 100 characters)

1. **Shelter and Emergency Services**
Night by night safety off the streets
2. **Rent Assistance – Short-Term**
Prevention and rapid re-housing
3. **Transitional Housing**
Program-supported housing for 6 -24 months
4. **Rent Assistance – Longer-Term**
Service-supported rent assistance, transition from streets to permanent housing
5. **Rental Access and Stabilization**
Human Services that help people find, enter, and retain rental housing
6. **Rental Housing Development and Finance**
Housing for the homeless and disabled, for poverty-wage housing
7. **Homeownership Development**
Living-wage housing development
8. **Homebuyer / Homeowner – Access Services**
Coaching, fairs, homeowner and financial education
9. **Homebuyer / Homeowner – Retention Services**
Foreclosure counseling, home repair, rehabilitation, lead hazard control
10. **Homebuyer / Homeowner – Financial Assistance**
First mortgage, down payment assistance
11. **Business Operations**
Bureau-level administration functions (e.g., finance, accounting, data/asset management)
12. **Director's Office**
Bureau-level executive and public information functions
13. **Strategic Housing Planning & Policy**
Bureau-level policy, planning and strategy functions
14. **Administration & Support**
Administrative and support activities specific to bureau programs