

Portland Housing Bureau

Community Development Service Area

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Bureau Summary

BUREAU MISSION

The mission of the Portland Housing Bureau (PHB) is to focus community resources on the unmet housing needs of the people of Portland. We accomplish our mission by:

- Stimulating and investing in the development and preservation of affordable housing;
- Supporting programs that help low-income Portlanders access, retain and repair their homes;
- Convening housing partners to develop resources, assess and meet local needs, adopt best practices and increase efficiency and collaboration; and by
- Promoting equitable participation in the economic opportunities our housing investments create.

BUREAU OVERVIEW

PHB stewards several sources of public funds for investments in affordable housing. Program investments cross a continuum: from resources aimed at ending homelessness, to rental housing for low-income individuals and families, and including targeted homeownership and homebuyer programs. Funds come from three major sources: tax increment financing (TIF) under City policy that directs 30% of all TIF expenditures to affordable housing; City general fund; and federal funds. The latter derive from the US Department of Housing and Urban Development (HUD) as both entitlement grants (mostly Community Development Block Grant and HOME) and competitive grant funds. PHB works to strategically deploy these various sources of funds to their highest and best use, be that for loans and grants for capital construction of new or rehabilitated housing, or for sub-recipient contracts to non-profits to deliver safety net services to Portlanders in poverty.

In addition to these programmatic investments, PHB works to influence local and regional policy and planning efforts that have a longer-term impact on the housing market, all the while seeking to improve alignment with state and local government partners that also work to alleviate poverty and move people towards self sufficiency.

PHB is a new City bureau, fully organized on July 1, 2010, though its origination had been planned for some eighteen months prior. As it continues efforts to synthesize programs, consolidate policy and investment approaches, and chart a new and forward-looking path, it is adopting a three- year Strategic Plan that will sharpen its focus on outcomes. Highlights of the PHB Strategic Plan and related Investment Priorities are discussed below.

PHB is increasingly emphasizing equity in its program investments. An emerging equity agenda recognizes the historic and institutional barriers to housing, homeownership, and economic stability experienced by communities of color. PHB seeks to place a greater reliance on community-validated data

(such as the Coalition of Communities of Color report) to understand unmet needs, and to more intentionally hold its partners accountable for removing barriers to serving members of minority communities in greater numbers.

Finally, PHB has recently assembled – and Council appointed – a new Portland Housing Advisory Commission (PHAC). This new Commission is intended to provide advice both to PHB and to Council on strategic priorities, alignment opportunities, and trade-offs inherent in the expenditure of public funds. PHAC essentially replaces the disparate advisory groups that had historically worked with PDC and the former BHCD. The charter of PHAC calls for it to provide advice on strategic directions; it does not have an explicit decision-making role. That said, PHAC has helped shape the new PHB Strategic Plan, and also serves as the BAC.

STRATEGIC DIRECTION

PHB has spent much of the last year convening a public advisory committee and engaging its stakeholders and community in the development of a three-year PHB Strategic Framework. The Bureau's almost-completed strategic plan establishes four core **goals** for the PHB to focus on over the next three years:

1. Meet Portland's need for quality affordable homes for its residents.
2. Ensure equitable access to housing and to the programs, resources and economic participation opportunities that the housing system delivers.
3. Develop, leverage and allocate housing resources to meet identified needs, sustain existing assets and to strengthen the housing delivery system.
4. Build a strong, sustainable Portland Housing Bureau that provides the highest level of leadership and service to its customers, stakeholders, employees and the community.

A current version of PHB's Strategic Framework, which sets out the goals, sub-goals and strategies that PHB will undertake over the next three years can be found here:

www.portlandonline.com/phb/index.cfm?c=49574

Through its Strategic planning work, PHB has adopted the following priorities for its investments, and has built its Requested Budget in alignment with these **priorities**:

1. Increase the production and preservation of rental housing, with an emphasis on deeply affordable rental homes for households facing the greatest challenges finding housing in the private market.
2. Programs with a proven ability to transition people quickly and permanently from homelessness to housing and that efficiently and sustainably prevent homelessness.
3. Programs and strategies proven to assist low and moderate income families from Portland's communities of color to sustainably purchase a home or to retain a home they already own.
4. Maintenance of a community safety net that provides short-term shelter, information, and referral services that help low-income Portlanders facing homelessness or housing crisis.

PHB's Vision:

- All Portland residents can find, afford and retain safe homes in active, healthy neighborhoods of their choice.
- All Portland residents have equitable access to housing and to the opportunities that safe, stable housing can deliver, free from discrimination and bias.

- Portland residents and neighborhoods thrive because the local housing sector aligns with other key sectors such as education, transportation, health and business to create a foundation for economic, social and cultural opportunity.

Values:

- **Equity:** Our work must recognize Oregon's history of housing discrimination and social injustice and address current-day disparities in access to the resources, programs and economic opportunities our work provides. We value a diverse workforce and a workplace that honors different voices and that celebrates the richness of culture as an essential component to our vision of equity.
- **Stewardship:** We invest, leverage and prioritize resources in projects and initiatives that provide the highest public value and greatest impact on critical community housing needs. We work in full compliance with adopted rules, regulations and policies. Our priorities and allocation of resources will balance the need to adapt to changes in the market with the need to maintain predictability and stability within the housing system.
- **Transparency:** Our success depends upon the integrity of our external and internal relationships. We facilitate broad public engagement to shape our decisions, investments and policies. Our decisions result from processes that are clear, open and without bias.
- **Innovation:** We believe that new thinking, partners and solutions will help us solve long-standing community problems and build a progressive and proactive organization.

Service Improvement Plan

In 2011-12, PHB will begin implementation of the Strategic Plan, which prioritizes these as the top three areas for service improvement:

1. **Review and Update Lending and Asset Management Guidelines.** Together with its housing industry partners, PHB is undertaking a careful examination of the process, guidelines and products it uses to underwrite housing projects and manage existing community housing assets for long-term viability. This initiative will improve transparency and service to customers, ensure that investments balance policy objectives against prudent fiscal practices and maintain a healthy and sustainable portfolio that will serve generations of Portlanders. Success of the lending and asset management guidelines initiative will be measured by the financial health of the portfolio and by a survey of borrowers to measure customer service improvement. This initiative will be completed by June 30, 2012.
2. **Implement a comprehensive, integrated PHB business and data system.** PHB is currently procuring a vendor and set of system products to upgrade and unify existing systems through which the bureau originates and services housing loans, conducts asset management and compliance functions and produces and analyzes investment and programmatic outcome data. Successful implementation of the new system is critical to provide timely and accurate information internally and to borrowers, community contractors, regulators, auditors and the public. The new business system will improve customer service to borrowers and contractors, enhance PHB's ability to analyze the impact of its programs and investments and provide for effective portfolio and asset management. Success of the business system initiative will be measured by customer service surveys and by the level of improvement to and expansion of PHB's new online production report. Implementation will be completed by June 30, 2012.
3. **Establish and achieve equity targets for how the community utilizes PHB-supported housing programs and participates in the economic opportunities PHB's investments create.** PHB will set and exceed clear, measurable targets for utilization of PHB-supported programs by subpopulations. PHB will also set measurable targets for contractor and sub-contractor

participation. The Bureau is currently developing strategies to set and achieve targets in the upcoming year with its Equity and Diversity Council, the Portland Housing Advisory Commission and with its community partners. The achievement of this goal will be measured by comparing utilization and participation data over FY 2011-12 to established targets and current year data that is published and tracked in the bureau's production report. The targets under this initiative will be set before the start of the fiscal year, with program adjustments and data collection occurring throughout the fiscal year, and a final data analysis completed by September 30, 2012 to measure success.

SUMMARY OF BUDGET DECISIONS

PHB Budget Structure

PHB's resources are located in seven separate funds. These include the General Fund, the Community Development Block Grant Fund, the HOME Grant Fund, the Federal Grant Fund, the Tax Increment Financing Reimbursement Fund, the Headwaters Apartment Complex Fund, and the Housing Investment Fund.

Budget Direction

The bureau has engaged a Portland Housing Advisory Commission (PHAC). The PHAC replaces the former Housing and Community Development Commission (HCDC) and takes on the role of budget advisory committee during the budget process. This citizen committee reviewed PHB financial, programmatic, and strategic plan details and provided recommendations concerning direction and priorities.

Additionally, OMF directed bureaus to participate in two program ranking exercises in an effort to guide budget decisions. PHB used the priorities that were developed in the recently completed strategic planning process to guide the program rankings. These priorities were developed with a high degree of citizen and stakeholder input, as well as robust engagement of staff and jurisdictional partners. In future years, the bureau will conduct separate ranking exercises.

Decision Packages

The bureau is requesting the conversion of \$1 million of serial one-time General Fund resources (backfilled by federal stimulus funds the past two fiscal years) and \$3.7 million of continued serial one-time General Fund resources. The bureau is also making the required 1.5% General fund reduction of \$92,568.

- **Ending Homelessness and Related Programs**
 - **Prevention and Rapid Re-Housing** - Short-term rent assistance is a highly effective tool to prevent eviction and keep people housed, and to rapidly end homelessness for most families or individuals. For the last two years PHB and its partners have benefitted from a large injection of federal stimulus funds (HPRRP) aimed at specifically at prevention and rapid re-housing. These funds have expired, so this package helps backfill the loss of federal funds while continuing long-standing one-time funding. **[Add Package - \$1,000,000 ongoing General Fund, \$978,000 one-time General Fund]**
 - **Housing Access Services** - This request continues long-standing general fund one-time funding for programs providing information & referral, as well as advocacy and case management for low-income renters confronting homelessness, eviction, housing discrimination and unhealthy housing conditions. PHB's Housing Access and Stabilization programs represent a community-wide safety net that assists individuals and households (many with rental screening barriers such as poor credit, evictions and

criminal history) to obtain and retain housing. These programs are especially critical given the current economic climate and tight local rental housing market. **[Add Package - \$456,300 one-time General Fund Request.]**

- **Shelter and Emergency Services** - This package continues long standing one-time general fund resources to ongoing general fund support for the three types of shelters PHB invests in: year-round; winter; and severe weather. Shelter operations remain a critical component of the safety net for the community, and PHB is working closely with Multnomah County, HAP, and its non-profit partners to ensure that investments and outcomes are aligned as closely as possible in this arena. New collaborative efforts are aimed at helping people in emergency shelters to regain permanent housing as quickly as possible. In some cases, transitional housing is necessary given individual circumstances. But for individuals and families where that is not the case, the most cost-effective and humane approach is to minimize shelter stays by helping people link to social, health and employment services while helping them secure a permanent housing solution through programs like short-term rent assistance. **[Add Package - \$1,734,000 one-time General Fund]**
- **Homeownership Programs**
 - **Home Ownership Programs & Services** - This request continues long-standing general fund one-time funding for the homeowner and homebuyer support programs. Consistent with the PHB Strategic Plan, homeowner and homebuyer programs will increasingly be targeted to minority communities. PHB hopes to continue several successful programs carried out in partnership with community-based non-profits and the mortgage banking and real estate sectors that aim to overcome gaps in minority homeownership rates. These funds will be leveraged with other PHB resources – notably TIF in at least two URA’s and certain federal funds. **[Add Package - \$500,000 one-time General Fund]**
- **Reductions**
 - **Mandatory 1.5% General Fund Reduction** - The following decision package reflects the mandatory General Fund reduction specified by OMF and includes a true ongoing component comprising of staffing reductions in addition to the one-time reduction of ongoing General Fund discretionary. The bulk of the reduction is to various contracts in the Shelter & Emergency Services area, and a small reduction in non-profit sponsorships. The bureau is continuing staffing reductions that occurred in FY 2010-11. Three of the positions identified for reduction in this package include a General Fund funding component; however the General Fund portion of funding is very small compared to CDBG and TIF. **[Reduction Package - \$92,568 General Fund, \$86,628 Non-General Fund Sources]**
 - **Additional Position Reductions** - The Requested Budget makes further staffing levels in the bureau as a response to declining TIF resources and flattening federal resources. This includes a reduction of six full time positions and one expiring limited term position. **[Reduction Package - \$249,016 Non-General Fund Sources]**

PHB’s total staffing is 57 positions after the reductions.

Summary of Bureau Budget

	FY 2008-09 Year-End Actuals	FY 2009-10 Year-End Actuals	FY 2010-11 Revised Budget	FY 2011-12 Requested Without DP's	FY 2011-12 Requested Budget
Portland Housing Bureau					
Expenditures					
Unappropriated Fund Balance	704,958		0	0	0
Personal Services	2,905,742		6,525,132	6,663,699	5,783,535
External Materials and Services	39,825,127		139,487,369	77,512,806	82,578,219
Internal Materials and Services	501,864		2,872,295	1,217,769	1,198,286
Capital Outlay	0		0	0	0
Bond Expenses	7,287,608		1,291,422	1,175,300	1,175,300
Fund Transfers - Expense	956,831		2,243,572	143,268	143,268
Contingency	0		2,969,799	997,162	1,071,394
Total Expenditures	52,182,130		155,389,589	87,710,004	91,950,002
Resources					
Budgeted Beginning Fund Balance	5,678,365		3,518,306	1,073,867	1,073,867
Charges for Services	0		248,766	260,800	260,800
Intergovernmental Revenues	15,885,830		125,310,297	67,459,310	67,123,666
Interagency Revenue	11,000		11,500	0	0
Fund Transfers - Revenue	1,021,052		2,118,572	0	0
Bond and Note	6,801,725		12,529,000	5,079,596	5,079,596
Miscellaneous	8,794,123		1,682,890	7,659,162	7,659,162
General Fund Discretionary	13,990,035		9,970,258	6,177,269	10,752,911
Total Resources	52,182,130		155,389,589	87,710,004	91,950,002

FTE Summary by Bureau
Portland Housing Bureau

Class	Title	CY_REVBUD {Rep}		V52_NO_DP {Rep}		V52_TOTAL {Rep}	
		No.	Amount	No.	Amount	No.	Amount
30000012	Office Support Specialist II	1.00	43,428	1.00	43,428	1.00	43,428
30000062	Accountant I	1.00	52,500	1.00	52,500	1.00	52,500
30000064	Accountant III	1.00	58,800	1.00	61,272	1.00	61,272
30000417	Housing Director	1.00	139,044	1.00	144,744	1.00	144,744
30000433	Administrative Specialist, Sr	8.00	387,492	8.00	398,524	7.00	357,052
30000441	Business Operations Manager	1.00	98,868	1.00	98,868	1.00	98,868
30000448	Business Systems Analyst	1.00	69,024	1.00	71,856	0.00	0
30000450	Management Assistant	1.00	50,232	1.00	51,264	1.00	51,264
30000452	Management Analyst, Sr	1.00	83,640	1.00	83,640	1.00	83,640
30000453	Management Analyst, Principal	1.00	90,444	1.00	93,216	1.00	93,216
30000462	Program Specialist, Assistant	2.00	137,232	2.00	137,232	2.00	137,232
30000463	Program Specialist	5.00	311,231	5.00	322,138	5.00	322,138
30000464	Program Coordinator	12.00	820,559	12.00	842,748	10.00	732,924
30000465	Program Manager	4.00	328,436	4.00	333,216	3.00	249,564
30000466	Program Manager, Sr	1.00	120,000	1.00	120,000	1.00	120,000
30000493	Community Outreach & Informtn Rep, Sr	2.00	134,940	2.00	138,024	0.00	0
30000495	Public Information Officer	1.00	65,892	1.00	68,592	1.00	68,592
30000504	Housing/Community Development Oper Mgr	1.00	106,284	1.00	106,284	1.00	106,284
30000566	Financial Analyst, Assistant	1.00	65,992	1.00	68,296	1.00	68,296
30000567	Financial Analyst	1.00	74,532	1.00	75,482	1.00	75,482
30000568	Financial Analyst, Sr	1.00	62,628	1.00	62,628	1.00	62,628
30000569	Financial Analyst, Principal	1.00	74,220	1.00	76,497	1.00	76,497
30001260	Housing Director, Assistant	1.00	98,004	1.00	100,342	1.00	100,342
30001361	Housing Construction Coordinator	2.00	139,332	2.00	142,092	2.00	142,092
30001362	Housing Construction Coordinator, Sr	3.00	231,804	3.00	234,780	3.00	234,780
30001363	Housing Development Finance Coordinator	4.00	333,696	4.00	334,560	2.00	168,144
30001364	Housing Loan Coordinator	1.00	60,312	1.00	62,784	1.00	62,784
30001365	Housing Loan Coordinator, Sr	2.00	126,924	2.00	132,132	2.00	132,132
30001367	Lead Grant Program Coordinator	1.00	67,284	1.00	70,044	1.00	70,044
30001369	Housing Loan Compliance Analyst II	1.00	63,852	1.00	63,852	1.00	63,852
30001370	Housing Loan Compliance Analyst III	1.00	65,904	1.00	68,604	1.00	68,604
Total Full-Time Positions		65.00	4,562,530	65.00	4,659,639	56.00	4,032,735

Administration & Support

The Administration & Support program is comprised of the Director's Office, Business Operations Division, and Policy and Planning.

Director's Office

The Director's Office includes Public Information/Affairs, executive level support, and the bureau Director. The Director has five direct reports: the Assistant Housing Director responsible for Housing Programs: the Business Operations Manager: the Senior Bureau Operations Manager responsible for Planning, Policy & Communications: the Public Information Officer: and the Executive Assistant.

Business Operations

The Business Operations Division includes Finance, Accounting, Asset Management, Loan Servicing, Human Resources, Information Technology, Data Analysis & Research, Compliance, Audits, and Administrative Support. These functions ensure that the service delivery teams have adequate information and support to carrying out their functions in the most efficient and effective means possible. Within Business Operations, there are four direct reports to the Business Operations Manager, including: the Principal Financial Analyst responsible for Finance & Accounting, the Senior Management Analyst responsible for Data/IT, the Program Manager responsible for Asset Management & Loan Servicing, and the Program Coordinator responsible for Compliance and Human Resources.

Policy and Planning

The Policy and Planning Division includes: Strategic Planning, Public Involvement, Housing Policy Development and Management, Resource Development, Legislative and Intergovernmental Affairs and Administrative support. The role of the Policy and Planning Division is to ensure that PHB makes its development and programmatic investments within a sound strategic plan and framework that addresses the most critical housing needs. This division also works to connect PHB's work with the work of other City bureaus and regional governments and to ensure that PHB is well-informed by housing needs data and by public input.

Within the Policy and Planning Division, there are five direct reports to the Policy and Planning Manager, including: a Senior Management Analyst responsible for housing policy development, a Program Manager responsible for Legislative Affairs and Public Involvement, two Program Coordinators responsible for Planning and Public Involvement and the Senior Administrative Specialist responsible for Administrative Support.

Performance

Performance for the Administration & Support program can be found in the performance measures table, which includes both trend and projection information.

Summary of Program Budget

	FY 2008-09 Year-End Actuals	FY 2009-10 Year-End Actuals	FY 2010-11 Revised Budget	FY 2011-12 Requested Without DP's	FY 2011-12 Requested Budget
Administration & Support					
Administration			0	0	0
Administration & Support			525,293	462,899	399,515
Business Services			5,391,601	5,247,062	5,121,562
Director's Office			943,732	608,516	603,516
Planning & Policy			778,958	842,805	619,485
Total Administration & Support			7,639,584	7,161,282	6,744,078

Portland Housing Bureau

Performance Measures

Program and Performance Measure	Type	FY 2008-09 Year-End Actuals	FY 2009-10 Year-End Actuals	FY 2010-11 Revised Budget	FY 2011-12 Performance No Dec Pkg	FY 2011-12 Performance With Dec Pkg
Administration & Support						
HC_0085 - % PHB Data Users Providing Accurate & Timely Data	EFFECTIVE	75%	75%	85%	85%	85%
HC_0083 - Admin Costs As a % Of Bureau Level Budget	EFFICIENCY	6%	9%	7%	8%	8%
HC_0082 - Number of Sub-recipient Contracts Processed	WORKLOAD	139	101	93	85	85
HC_0084 - # of Users Trained And Supported In PHB Data Systems	WORKLOAD	729	707	800	800	800
HC_0086 - # of Housing Assets Monitored	WORKLOAD	305	305	171	171	171

Economic Opportunity

Overview

City Council transferred the Economic Opportunity initiative to the Portland Development Commission effective July 1, 2009 -- the same time the Portland Housing Bureau was created. PHB passes CDBG funds to PDC to support these programs and services. General Fund resources are budgeted directly in the PDC's allocation.

The FY 2010-11 Revised Budget for this program reflects FY 2009-10 contract carryover funding. These contracts were funded primarily by CDBG and CDBG-ARRA stimulus resources. In addition, the CDBG allocation for FY 2011-12 reflects the bureaus estimate of a 5% reduction in the CDBG entitlement allocation.

Information on goals and service changes is available in the PDC budget.

Summary of Program Budget

	FY 2008-09 Year-End Actuals	FY 2009-10 Year-End Actuals	FY 2010-11 Revised Budget	FY 2011-12 Requested Without DP's	FY 2011-12 Requested Budget
Economic Opportunity					
Community Services			0	0	0
Economic Opportunity			3,725,371	2,703,245	2,703,245
Economic Opportunity Initiatives			0	0	0
Microenterprise Growth			0	0	0
Workforce Development			0	0	0
Total Economic Opportunity			3,725,371	2,703,245	2,703,245

Housing Access & Stabilization

Overview

The Bureau's Ending Homelessness Initiative (EHI) creates home for thousands of households per year by investing in programs and coordinating community initiatives. In FY 2009-10, EHI funding helped nearly 6,000 families and individuals by preventing their homelessness, supporting their transition to greater housing stability and enabling them to secure permanent homes. The EHI is fully aligned with the goals of the 10-Year Plan to End Homelessness for Portland/ Multnomah County, adopted by City Council and the Multnomah County Commission in December 2004.

EHI staff facilitates and influences the broader community-wide process that implements and evaluates progress of the 10-Year Plan. The EHI also works within PHB to align broader bureau resources with community-wide strategies to reduce homelessness, including through the Consolidated Plan. In Fall 2010, the EHI team was augmented by staff and programs focused on Housing Access & Stabilization, that include contracts with 211Info, as well as HOPWA-funded programs.

EHI funds are contracted to some 27 nonprofit and public agencies to provide a comprehensive range of services that address the diverse needs of homeless people, from street outreach to placing people into permanent housing. Services primarily fall into four categories:

- Supportive housing and rent assistance
- Shelter, transitional housing and emergency services
- Short-term rent assistance and eviction prevention
- Housing access and stabilization services

Performance

Performance of the Ending Homelessness Initiative can be found in the performance measures table, which includes both trend and projection information. *(Technical note – PHB has expanded the performance measures for households receiving rent assistance and housing placement [HC_0057 and HC_0061) to include both new households and households receiving ongoing support.]*

Changes to Activities and Services

EHI will renew current high-performing contracts, and may wish to reduce funding to limited contracts for services that are less aligned with core PHB mission and values, such as PHB's Equity Agenda. There will be continued jurisdictional coordination, as well as shelter/rent assistance refinements that will equate to shorter shelter stays. The Bud Clark Commons (a.k.a Resource Access Center) will open in mid-June 2011 and require significant investment in first few years. The team will work toward stronger connections between EHI efforts and the City-supported affordable housing portfolio, and also integrate PHB strategic plan goals.

Summary of Program Budget

	FY 2008-09 Year-End Actuals	FY 2009-10 Year-End Actuals	FY 2010-11 Revised Budget	FY 2011-12 Requested Without DP's	FY 2011-12 Requested Budget
Housing Access & Stabilization					
Access and Stabilization			0	1,715,577	2,097,873
Community Planning			0	0	0
Homeless Services			0	0	0
Housing Access & Stabilization			0	0	0
Prevention & Rapid Rehousing			3,266,951	910,735	2,346,735
Public Safety and Livability			0	0	0
Shelter & Emergency Services			4,700,683	3,066,985	4,735,467
Supportive Housing			5,248,599	3,807,311	4,349,311
Transitional Housing			1,396,310	0	0
Total Housing Access & Stabilization			14,612,543	9,500,608	13,529,386

Portland Housing Bureau

Performance Measures

Program and Performance Measure	Type	FY 2008-09 Year-End Actuals	FY 2009-10 Year-End Actuals	FY 2010-11 Revised Budget	FY 2011-12 Performance No Dec Pkg	FY 2011-12 Performance With Dec Pkg
Housing Access & Stabilization						
HC_0050 - Percent of exits from shelter into stable housing	EFFECTIVE	36%	58%	28%	23%	25%
HC_0054 - Percent of households exited from transitional housing into permanent housing	EFFECTIVE	45%	72%	35%	35%	35%
HC_0062 - Percent of households receiving placement assistance retaining permanent housing at 6 months	EFFECTIVE	84%	83%	90%	90%	90%
HC_0063 - Percent of households receiving placement assistance retaining permanent housing at 12 months	EFFECTIVE	76%	74%	77%	77%	77%
HC_0065 - Percent of households exited into permanent housing	EFFECTIVE	60%	92%	65%	65%	65%
HC_0095 - Average length of rent assistance, eviction prevention in days	EFFECTIVE	0	0	91	90	90
HC_0055 - Average length of stay in transitional housing (in days)	EFFICIENCY	423	60	288	288	70
HC_0049 - Number of households served in emergency shelters	WORKLOAD	1,522	1,935	1,251	1,196	1,418
HC_0053 - Number of households served in facility based transitional housing	WORKLOAD	691	1,150	187	86	100
HC_0057 - Number of households receiving receiving rent asst and homeless prevention	WORKLOAD	868	423	1,880	829	1,570
HC_0061 - Number of households receiving placement rent assistance	WORKLOAD	447	515	1,037	814	300
HC_0064 - Number of households residing in permanent supportive housing units	WORKLOAD	908	865	674	594	83

Housing Production & Preservation

Overview

The Housing Development and Finance (HDF) team is responsible for housing development using funding sources including TIF, HIF, CDBG, HOME, HOPWA and General Fund. This program focuses on the acquisition, development and preservation of new and existing affordable housing assets.

This team has four major components:

1. Catalyzing affordable housing development through the disposition of publically owned property in conjunction with PHB financing commitments.
2. Structuring PHB investments through the negotiation of loan terms and underwriting.
3. Closing these loans/grants in partnership with the City Attorney's office and as necessary OMF.
4. Providing oversight and disbursements of PHB funds to projects while in construction.

Wherever possible, available funds for new housing development or preservation have been and will continue to be made available through competitive funding cycles.

Performance

The Rental Housing Development Program performance can be seen in the Performance Measures table which includes trends and projections for performance.

Changes to Activities and Services

The HDF team will continue to be the delivery mechanism for City investments in affordable housing, however how these funds are underwritten, delivered and monitored will change over the coming year and beyond. There is a current effort to analyze the PHB loan portfolio as well as a capital needs assessment of existing projects in which the City has previously invested. This analysis will produce recommendations for right sizing public investment into affordable housing projects so that these assets have the long term stability needed to minimize the possibility of a second public investment prematurely.

The HDF team will also consider changes to how it structures affordable housing investments based on the housing market needs study that will be performed as framed by PHB's Strategic Plan. For example, if the housing market needs study makes recommendations that the best approach to increasing affordable housing is through acquisition/rehab loans instead of new construction loans then with support from the Housing Commissioner this could be how PHB invests its funds in that geography.

Because of reductions in available TIF and federal funds for new project investments, HDF will be reducing staff in this division.

Summary of Program Budget

	FY 2008-09 Year-End Actuals	FY 2009-10 Year-End Actuals	FY 2010-11 Revised Budget	FY 2011-12 Requested Without DP's	FY 2011-12 Requested Budget
Housing Production & Preservation					
Homeownership			0	0	0
Housing Development & Finance			0	1,970,241	1,970,241
Housing Production & Preservation			1,500,000	0	0
New Construction			0	43,343,034	43,743,354
Preservation			0	6,269,796	6,109,944
Rehabilitation			96,103,871	8,666,569	8,569,285
Rental Housing Access & Stabilization			6,336,765	0	0
Schools, Families, and Housing			0	0	0
Total Housing Production & Preservation			103,940,636	60,249,640	60,392,824

Portland Housing Bureau

Performance Measures

Program and Performance Measure	Type	FY 2008-09 Year-End Actuals	FY 2009-10 Year-End Actuals	FY 2010-11 Revised Budget	FY 2011-12 Performance No Dec Pkg	FY 2011-12 Performance With Dec Pkg
Housing Production & Preservation						
HC_0069 - Vacancy Rate of Units Built 0 to 60% MFI	EFFECTIVE	3%	3%	50%	50%	50%
HC_0092 - Rental Units preserved affordable for 0-60 MFI	EFFECTIVE	0	0	68	207	207
HC_0091 - Investment per affordable housing unit	EFFICIENCY	\$0	\$0	\$116,472	\$116,472	\$116,472
HC_0093 - Investment per affordable housing unit preserved	EFFICIENCY	\$0	\$0	\$30,235	\$30,235	\$30,235
HC_0094 - Investment per affordable unit rehabilitated	EFFICIENCY	\$0	\$0	\$34,252	\$34,252	\$34,252
HC_0070 - Rental units built affordable for 0 to 60% MFI	WORKLOAD	252	256	394	372	372
HC_0072 - Rental units built affordable for 61+ to 100% MFI	WORKLOAD	84	16	15	5	5
HC_0081 - Rental Rehab Units 0 to 60% MFI	WORKLOAD	219	397	503	255	255

Homeowner Access & Retention

Overview

Neighborhood Housing Programs (NHP) funds services to help new homebuyer's access homeownership opportunities and support current homeowners in retaining their homes. Support for first time homebuyers includes education and counseling for households navigating the home buying process for the first time. Assistance provided for down payments and closing costs helps households be able to afford homeownership. NHP helps current homeowners retain their homes by funding foreclosure prevention education and counseling to those facing foreclosure.

Support is also provided with other related retention issues such as title, estate, and property tax problems that can lead to the loss of homes. Funding for home repair grants and loans helps current homeowners maintain their homes, which helps to preserve existing housing stock and prevent health and safety problems that can also lead to housing instability.

Programs to improve the condition of existing housing address the impact that housing condition can have on health. These "healthy homes" programs include administration of federal funds to reduce lead-based paint hazards in homes with young children and federal grant funds to address habitability issues such as mold, mildew, radon, pests, and other indoor air quality issues that can cause allergies, asthma, and other health problems. Relocation assistance is also provided to low-income renters with documented health problems that are caused by the condition of their rental unit.

In addition, NHP administers programs that incent the development of new homeownership opportunities for low and moderate income households, including System Development Charge (SDC) waivers and Limited Tax Exemptions (LTEs). Future modification of these programs is possible through policy analysis and inter-jurisdictional work currently under way. Finally, the Mortgage Credit Certificates (MCC) is a federal tax credit to first-time homebuyers that reduces annual income tax liability for the life of the mortgage, to help low- to moderate-income buyers afford homeownership.

Performance

Homeownership program performance measures can be found in the performance measures table, which includes both trends and projections.

Changes to Activities and Services

Under the Bureau's Strategic plan, NHP will undertake work to strengthen the system of funded services that are provide to potential homebuyers and existing households of color and ensure that the current programs are providing optimum customer service and complement existing services available in the private market. Strategic Plan work will include efforts to increase awareness and coordination of available homeownership assistance programs in the community with a focus on households of color. NHP will convene stakeholders to evaluate homeownership data to better understand the current market and develop strategies to address need, gaps, and opportunities, including researching and implementing best practices to increase minority homeownership.

Summary of Program Budget

	FY 2008-09 Year-End Actuals	FY 2009-10 Year-End Actuals	FY 2010-11 Revised Budget	FY 2011-12 Requested Without DP's	FY 2011-12 Requested Budget
Homeowner Access & Retention					
Healthy Homes			0	1,694,747	1,694,747
Home Repair			5,485,359	2,436,754	2,389,642
Homebuyer & Foreclosure Education/Counseling			582,559	128,610	628,610
Homebuyer Financial Assistance			4,822,449	1,281,616	1,239,736
Homeownership Development			8,076,295	0	0
Tax Exemption & Fee Waiver			0	237,772	237,772
Total Homeowner Access & Retention			18,966,662	5,779,499	6,190,507

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Homeowner Access & Retention						
HC_0038 - Number of households receiving homebuyer education/counseling and purchasing homes	EFFECTIVE	405	338	696	354	354
HC_0090 - Average investment per household for elderly/disabled receiving small home repairs	EFFICIENCY	\$0	\$0	\$791	\$791	\$791
HC_0096 - Investment per household for owner occupied home repairs	EFFICIENCY	\$0	\$0	\$6,882	\$6,882	\$6,882
HC_0037 - Number of Households receiving homebuyer education or counseling and purchasing homes	WORKLOAD	1,465	898	2,617	554	2,100
HC_0074 - Homeownership units built	WORKLOAD	264	284	204	140	140
HC_0076 - Number of owner occupied home repair loans	WORKLOAD	129	109	111	103	103
HC_0088 - Number of homeownership units assisted by limited tax exemptions	WORKLOAD	0	0	194	120	120
HC_0089 - Number of Units assisted by SDC waivers	WORKLOAD	0	0	184	130	130
HC_0097 - Number of households attending homebuyer fairs	WORKLOAD	0	0	1,271	0	2,000
HC_0098 - Number of elderly/disabled households receiving small scale home repairs	WORKLOAD	0	0	1,333	1,239	1,239