

## II. Introduction

The Consolidated Annual Performance and Evaluation Report (CAPER) is a consolidated reporting document that covers local programs and services funded by federal entitlement programs. These funds are applied for under the principal planning document referred to as the Consolidated Plan, which is submitted to the U.S. Department of Housing and Urban Development. The FY 2010-2011 CAPER reports on activities detailed in the FY 2010-2011 Consolidated Action Plan.

The goal of the consolidated application, planning, and reporting on these federal grant programs is to integrate services in a coordinated way that most comprehensively serves the needs of the community. This approach eliminates the need for separate funding applications and public-planning meetings, while also allowing reporting accomplishments through a single computerized reporting process.

The Consolidated Annual Performance and Evaluation Report cover four entitlement grants administered by the City of Portland:

1. **Community Development Block Grant (CDBG) Program:** Portland is the entitlement jurisdiction for this program and receives a formula allocation. Included in this report under *Section III. CDBG Narrative* are the City of Gresham and Multnomah County's Consolidated Annual Performance and Evaluation Report 2010 for their jurisdictions.
2. **HOME Investment Partnership:** Portland is the lead jurisdiction for the Portland HOME Consortium which includes the City of Gresham and Multnomah County;
3. **Emergency Shelter Grant (ESG):** The City of Portland is the only jurisdiction in the County that receives a direct award of ESG funds;
4. **Housing Opportunities for Persons with AIDS (HOPWA):** The City of Portland administers this grant program for a seven county Eligible Metropolitan Area (EMA) comprised of Clackamas, Columbia, Multnomah and Yamhill Counties, Oregon and Clark and Skamania Counties, Washington.

In FY 2010, the total award of the four federal entitlement grants for the Consortium in this report is \$18,284,960

Resources	Portland	Multnomah County	City of Gresham	Total
CDBG	\$10,866,899	\$332,192	\$959,393	<b>\$12,158,484</b>
Program Income	\$600,000	-	\$330,000	<b>\$930,000</b>
Carry Over	\$3,158,534	\$283,022	\$122,398	<b>\$3,563,954</b>
HOME	\$4,596,522	-	\$625,127	<b>\$5,221,649</b>
Program Income	\$400,000	-	\$487,953	<b>\$887,953</b>
Carry Over	-	-	\$103,657	<b>\$103,657</b>
ESG	\$441,899	-	-	\$441,899
HOPWA	\$1,088,055	-	-	\$1,088,055
Carry Over	\$708,847	-	-	\$708,847
<b>Total</b>	<b>\$21,860,756</b>	<b>\$615,214</b>	<b>\$2,628,528</b>	<b>\$25,104,498</b>

## **Assessment of Goals and Objectives**

### **Consortium Objectives**

During the 2010-2011 report period, the Consortium continued its efforts to address the priority housing and community needs identified in the Consolidated Plan FY 2010-2011.

### **Affordable Housing**

Goals and priorities for housing and housing service programs, including those for populations with special needs such as the elderly, disabled, or individuals with AIDS are targeted towards serving populations with the greatest need. Other housing services include major and small-scale home rehabilitation programs designed to keep individuals and families in their homes. They also include the removal of lead-based paint hazards, the installation of weatherization materials, and the installation of accessibility improvements occupied by those with mobility impairments.

### **Ending Homelessness**

Funding for homeless services and facilities is targeted to support the 10-Year Plan to End Homelessness through the community's Continuum of Care for homeless adult singles, families, and youth. Services focus on providing shelter and related services in order to reduce the risk of homelessness, provide emergency shelter, and maintain housing options for these populations. This includes specialized services for populations with mental illness and those requiring alcohol and drug free housing choices. Additionally, the City participates in the Fresh Start Program to assist persons who cannot access housing by working with landlords, service providers and clients.

### **Economic Opportunity Initiative**

Goals contained in the Consolidated Plan for economic development are targeted towards the creation and retention of wealth and employment opportunities, focusing the benefit of these programs directly to low/moderate income people. Included in economic development are programs related to issues necessary for obtaining and maintaining successful employment such as adequate training and affordable quality childcare.

### **Six-Year Goal Accomplishments**

We have prepared a matrix entitled Assessment of Six -Year Goal Accomplishments (the Six-Year Matrix). The Six-Year Matrix lists the Six-year goals for each program area set out in the Consolidated Plan 2005-2011 Five-Year Strategic Plan, and shows the incremental annual progress towards each goal, as well as the cumulative progress. Comments are included when necessary to explain a discrepancy between progress numbers and the goal. *Please see Exhibit 4*

### **Managing the Process**

A draft of the 2010 CAPER was made available for the 15-day public comment period beginning September 7, 2011; including Legal notice to request for comment in The Oregonian newspaper. One comment was received.

Interested residents and community groups may request pertinent sections of the 2010 CAPER for translation. For assistance, contact Stella Martinez at (503)-823-2383 or by e-mailing [stella.martinez@portlandoregon.gov](mailto:stella.martinez@portlandoregon.gov).

## **Furthering Fair Housing**

### **Assessment of Progress on Fair Housing**

The Portland Consortium completed an update of the 2005 Analysis of Impediments to Fair Housing in 2011. In summary, the AI recommended continued cross-jurisdictional funding of Fair Housing providers to provide necessary outreach, education and enforcement. There was an identified need to strengthen the outreach efforts by being culturally and linguistically informed and to increase the number of individuals being served from historically underrepresented groups and the protected classes. In addition, the AI recommended creating a regional Fair Housing Advocacy Committee to address issues raised that could not be fully addressed during the AI process.

The Consortium will be continually updating and refining its 2010-2011 AI Action Plan as more data becomes available from the 2010 Census and other sources. In addition to the actions of the AI Plan, the Consortium has been actively involved in developing a housing equity agenda. Multnomah County has provided leadership on the broad issue of health equity. It has presented research that focuses attention on the “social determinants of health.” Housing is a key determinant, because its condition and location determine, in large measure, a household’s access to recreational opportunities, healthy food, high-quality education, and good employment. For this reason, historical patterns of housing segregation can result in generations being cut out of “opportunity areas.” During 2010-11, Portland and Multnomah County were actively involved in regional pre-planning and application for the Sustainable Communities Initiative. Planning efforts focused on ways that the housing system could expand residential opportunities for low income households and households of color in “opportunity areas,” and on transit and other methods that could be used to connect residents who do not live in “opportunity areas” with such opportunities. This is exciting because it addresses the residual institutional segregation that has resulted from past discriminatory practices.

Following is a report of actions taken during FY 2010-2011 based on findings and recommendations in the 2011 AI. These actions fully meet the Consortium’s obligation to affirmatively further fair housing by undertaking a multi-agency approach to fair housing outreach, education and enforcement. All three jurisdictions provided funding (CDBG), augmented by an allocation from the City of Portland General Fund.

**Direct Fair Housing Services  
FY 2010/2011**

2011 AI Recommendation/Programs	Agency	Outcomes
<b>Funded Activities – Recommendations Related to Federal, State, and Local Fair Housing Law</b>		
<b>City of Portland Funded Activities</b>		
<b>Fair Housing Education, outreach, enforcement- Commit to County wide support and enhancement of education and enforcement of fair housing law and use various tools including testing to document discrimination with a special focus on homeownership and rental housing.</b>		
<b>Fair Housing Services and Enforcement</b> This project provides advice and representation for people experiencing discrimination with the City of Portland.	Legal Aid Services of Oregon	In 2010/11 60 people were served with advice or representation. 13 of the cases had sufficient evidence and 8 were successfully prosecuted. 7 Fair Housing Presentations
<b>Fair Housing Education &amp; Enforcement</b> – This project provides advice and representation for people experiencing housing discrimination in the City of Portland. Key program elements include intake, referrals, testing, and fair housing education for housing consumers and housing providers. The 2011 AI identified a need for regional coordination of Fair Housing initiatives, and housing needs assessments.	Fair Housing Council of Oregon	Over 75 people were served.  355 calls were screened from Portland citizens related to fair housing.  There were 39 intakes of bona allegations  There are 101 testers in the tester pool  87.5% of Fair Housing training attendees reported an increased knowledge of fair housing laws  There were 12 reasonable accommodation assists  14 fair housing training sessions were conducted for agencies receiving PHB funding.  Fair Housing Council of Oregon has been identified as the regional representative body that can convene the Consortium to create
<b>Enforcement</b> The 2011 Analysis of Impediments has identified enforcement as a key issue, and information for housing consumers about how to make fair housing complaints.	Oregon Bureau of Labor and Industries, Civil Rights Division (BOLI)	<b>City of Portland:</b> <b>38</b> new cases were accepted in 2010 13 were disability cases 10 race/color discrimination cases 7 familial housing complaints 5 cases had successful conciliation Proceeded to closure with complaints of violations of Portland's Civil Rights Ordinance.

<p><b>Fair Housing Education of Tenants-</b> Community Alliance of Tenants (CAT)– Hotline- Renter rights hotline to assist with housing stabilization for low-income renters including referrals to fair housing advocates, organizing fair housing rights trainings for members and making referrals for relocation assistance related to habitability issues.</p>	<p>Community Alliance of Tenants</p>	<p><b>2052</b> people were served by the call center for referrals. 21.6% were assisted with eviction-related problems. 26.1% were assisted with repair or habitability-related problems. 15 were referred to Impact NW for tenant relocation services due to habitability issues.</p>
<p><b>Housing Connections Operations</b> -Access to information was a key impediment to stable housing for low income renters and members of protected classes. The housing connections website provides quality rental listings and is actively advertized to low income renters, housing providers.</p>	<p>211 Info</p>	<p>Site statistics as of June 30, 2011: Total Unit Count – 87,972 Total Property Count – 6,432 Landlord and Property Management Companies with accounts in HC – 3,516 Agencies with accounts in HC – 387 Total Searches Since May 2002 – 2,105,157</p> <p>211info provided 2,242 people with housing information from Housing Connections by phone or e-mail.</p> <p>Designed to make information accessible to most users</p>
<p><b>Landlord Outreach-</b> Increase the rental housing provider awareness of fair housing law and housing connections and programs that increase access to appropriate safe housing for low income renters such as Rent Well, Housing Connections, and Lead hazard prevention.</p>	<p>Fair Housing Council of Oregon</p>	<p>In 2010/2011 Over 34 outreach efforts ranging from classes and forums to meetings were initiated to build awareness and participation by housing providers of programs such as Housing Connections and other consumer housing services that support low income renters Over 10,036 Housing Connections promotional materials were distributed</p>
<p><b>Services Information and Referral-</b>Lack of education about housing options. Historically under-represented communities and members of the protected classes are not getting information they need.</p>	<p>211 Info</p>	<p>More than 50,000 calls were made to 211info last year. More than 46% of the callers sought assistance with housing or utilities. Most of the calls were made by members of the protected classes and additional efforts are being made to increase the number of referrals made for members of protected classes.</p>
<p><b>Substandard Housing Relocation-</b> Lack of resources to relocate from housing with habitability issues becomes a barrier to access to housing.</p>	<p>Impact NW</p>	<p>46 families, displaced from substandard housing, were financially assisted to gain relocation services to obtain appropriate replacement housing.</p>
<p><b>Rent Well Translation-</b>Remove language barriers to obtaining quality information about tenant rights and advocacy.</p>	<p>IRCO</p>	<p>Increased the number of organizations with written materials in the language of their low income constituency.</p>
<p><b>Mini Homeowner Rehabilitation-</b> The 2011 AI identified the cost of modifications for habitability or safety was effectively an impediment to fairly access this building.</p>	<p>REACH and other housing development</p>	<p><b>500</b> new households were assisted in 2011. These funds provided an incentive to housing providers to make modification. An increased effort was made to advertize the fund and to make the funds available to under-represented populations and members of the protected classes.</p>

<p><b>Quality Rental Workgroup-</b> The 2011 AI Analysis identified the value of partnership between housing consumers and housing providers to increase compliance with existing habitability laws and support the maintenance of quality rental housing.</p>	<p>Bureau of Development Services</p>	<p>Implemented the following policies and program strategies to increase compliance with existing habitability laws and to support the maintenance of quality rental housing; -</p>
<p><b>Quality Rental Workgroup-Education-</b> 2011 AI called for increasing awareness of Fair Housing law, tenant rights, and access to advocacy, as key to preventing and resolving discrimination faced by someone in a protected class.</p>	<p>Portland Housing Bureau</p>	<p>Increased awareness by renters and landlords regarding tenant landlord rights, responsibilities that have increased the safety, stability and habitability of rental housing.</p>
<p><b>Healthy Homes-</b>Decrease exposure to multiple household hazards which contribute to asthma exacerbations and other serious illnesses among children under the age of six. The overrepresentation of children from the protected classes in the group with asthma and other household exposure illnesses becomes a fair housing issue due to conditions that concentrate members of the protected classes in low quality housing.</p>	<p>Multnomah County</p>	<p>Decreased exposure opportunities in 100 homes with children under the age of six. Outreach is designed to increase participation of historically under-represented populations, members of the protected classes and low income households.</p>
<p><b>N/NE Homeowner Retention-</b> Foreclosure and loss of equity has a disproportionate impact on the wealth and stability of people of color.</p>	<p>MHAC (Minority Homeownership Assistance Collaborative)</p>	<p>Assisted over senior households at risk of losing their homes in North and Northeast Portland. Increased the number of participants from historically underserved communities and members of the protected classes.</p>
<p>Tenant Based Rent Assistance- Focus on rent assistance for the homeless and those at risk of homelessness. Disabled and disabled low income families.</p>	<p>Home Forward</p>	<p>Provided rent assistance to 67 households with HOME TBRA funds.  Assisted a total of 2365 households with all Short-term rent assistance resources</p>
<p>Low cost accessibility accommodations Unlimited Choices – The Planning Jurisdictions should continue to support Unlimited Choices’ Adapt-a-Home, to provide low-cost accessibility accommodations.</p>	<p>Unlimited Choices</p>	<p>City of Portland: 100 households were assisted  Multnomah County: 18 households were assisted  City of Gresham: 63 households were assisted</p>
<p>Siting Program – The City of Portland should continue to fund its Office of Neighborhood Involvement to administer a siting assistance program that promotes the siting of special needs housing by providing the community education, dispute resolution services and tools such as Good Neighbor Agreements.</p>	<p>City of Portland Office of Neighborhood Involvement</p>	<p>City of Portland: PHB continues to contract with the Office of Neighborhood Involvement to address various housing siting issues.</p>

<p>Close the Minority Homeownership Gap - Portland City Council has adopted a goal of closing the Minority Homeownership Gap by 2015.</p>	<p>City of Portland:</p> <ul style="list-style-type: none"> <li>• Proud Ground</li> <li>• Habitat for Humanity,</li> <li>• Hacienda CDC</li> <li>• The Minority Homeownership Assistance Collaborative (MHAC),</li> <li>• HOST Development</li> </ul>	<p>City of Portland: See outcomes in the Homebuyer Programs Section.</p>
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**Funded Activities-Recommendations Related to Housing Choice**

<p><b>Rent Well</b>—Continue funding a renter education training program in English and Spanish. Research need for offering Rent Well classes in other languages and the need to translate class materials into other languages.</p> <p><b>Rent Well, Fresh Start and Risk Mitigation Pool</b> – Fresh Start, Rent Well, and the Risk Mitigation Pool offer landlords an incentive to relax their screening criteria by reducing the risk. Fresh Start and Rent Well are underutilized. Increase usage of these programs because they assist renters who do not meet traditional screening criteria.</p>	<p>Home Forward</p>	<p>In FY 10-11 the City worked with HAP and other partners to continue to implement Rent Well, the new tenant education curriculum developed in 09-10 to better meet the needs of participants. In FY10-11 the City further improved the curriculum by reducing the literacy level and making all curriculum materials alternatively available in Spanish.</p> <p>Rent Well Outcomes: Rent Well Landlord Guarantee Fund coverage was initiated for 38 new households and continued from the prior year for an additional 65. The program paid claims to landlords for 19 households – an 18% claim rate.</p> <p>671 individuals graduated from Rent Well.</p> <p>The new Rent Well curriculum incorporates focused information regarding fair housing and reasonable accommodation for the target population of the program.</p> <p>Fresh Start Outcomes: Fresh Start Landlord Guarantee Fund coverage was initiated for 3 households and \$5069 in claims were requested by landlords.</p> <p>Risk Mitigation Pool (RMP) Outcomes: 7 claims were paid from the RMP totaling \$10,890.</p>
<p><b>Removing Criminal Records</b> – The 2011 AI report identified criminal records as a barrier for housing consumers. Programs like “Clean Slate” are helpful. Due to the cap on the percentage of federal funds that may be spent on public services, this activity should be funded with non-federal funds.</p>	<p>N/A</p>	<p><b>City of Portland:</b> See program outcomes of Clean Slate Economic Opportunity Initiative participants.</p>
<p><b>Non-profit Housing Development and Land Trust</b> - City of Portland funds Proud Ground and a number of non-profit community development corporations to create affordable homeownership and rental opportunities and are marketed to underrepresented communities and members of the protected classes.</p>	<p>Proud Ground</p>	<p><b>City of Portland:</b> See outcomes in the Homebuyer Programs Section.</p>



<p><b>Accessible Unit Inventory</b> – All jurisdictions complete an inventory of all locally funded accessible units including details about accessibility features such as roll in showers. List this information in Housing Connections.</p>	<p>City of Portland</p>	<p><b>City of Portland:</b> Data refinement work started in FY 09-10 for the changes to Housing Connections to present the data to the public will be completed and will be completed in FY 11/12. METRO is also conducting a regional inventory that may contain accessibility information.</p>
<p><b>New RFP Selection Criteria for Affordable Units</b> – Discuss adding the following preferences to RFP selection and loan agreements in the funding of new and rehabilitated affordable housing developments:</p> <ul style="list-style-type: none"> <li>• accessible units</li> <li>• Smoke free housing (preferably entire buildings or floors)</li> </ul>	<p>City of Portland</p>	<p>Changes to RFP Selection Criteria will not be discussed until the Accessible Housing Inventory has been completed and results have been reviewed.</p>
<p><b>Landlord Tenant Issue Workgroup</b> – Continue support for the Quality Rental Housing Work Group (QRHW) especially when their work focuses on Fair Housing Issues. This workgroup of tenant advocates and property management industry representatives will explore strategies to address issues that could result in barriers to housing for members of protected classes, fair housing violations or health and safety issues for the community at large. Potential mechanisms include landlord licensing, seeking alternatives to "no cause" evictions, proactive unit inspections, increased police attention to illegal activity and expansion of landlord and tenant education programs.</p>	<p>The City of Portland</p>	<p>In QRHW FY 09-10 a handbook for tenant and landlords was drafted about City housing maintenance code requirements and information about how to address common housing conditions issues was drafted. In FY 10-11, the handbook and accompanying web site will be made available to the public. In FY09-10, an enhanced complaint system of rental housing inspections was piloted in East Portland through the provision of CDBG funds to the City's Bureau of Development Services for 1 housing inspector.</p> <p>The Fair Housing Advocacy Committee will take the recommendations of the 2011 AI Report and determine if there are remaining issues for a Landlord Tenant Issue Workgroup to address.</p>

<b>Staff Time/Planning-Recommendations Related to Housing Choice</b>		
<p><b>Increased Commission Recruitment</b> - All jurisdictions should increase recruitment efforts from protected class communities and economically diverse groups to fill vacancies on the Planning Commission, Housing and Community Development Commission, HAP Board, urban renewal advisory committees, project selection committees and other advisory bodies that oversee housing policies.</p>	<p>Office of Neighborhood Involvement</p>	<p>PHB continues to make every effort to have diverse stakeholders participate on its project selection and hiring committees.</p> <p>All City Bureaus, including PHB and P&amp;S, are participating in the City Public Involvement Network. The City's Public Involvement Advisory Committee is developing new requirements and best practices for increasing participation by members of communities of color and others whose interests have not been fully represented by the City's neighborhood system. PHB used these principals to create the Portland Housing Advisory Committee. Home Forward continues to seek diversity on its board and its current members represent multiple protected classes.</p>
<p><b>Require Acceptance of Section 8</b> - The 2011 Analysis of Impediments report acknowledged the work of the QRHW had improved the Section 8 voucher turn back rate but additional discussion was needed because Section 8 vouchers are not accepted everywhere.</p>	<p>Home Forward</p>	<p>Section 8 turn back rates fell from a high of 25% in 08-09, to approximately 10% in 09-10 and approximately 17% in FY 10-11.</p> <p>Attributable to:</p> <ol style="list-style-type: none"> <li>1. Landlord Mitigation Pool;</li> <li>2. Increased Ready to Rent Classes;</li> <li>3. New landlord service team;</li> <li>4. Faster Inspections;</li> <li>5. Landlord "Lunch-n-Learn;" and</li> <li>6. Strong customer service focused on business partnership with landlords.</li> </ol>
<p><b>Interior Habitability Codes</b> – Jurisdictions outside of City of Portland add an interior habitability code and provide adequate inspection and enforcement.</p>	<p>City of Gresham:</p>	<p>The City of Gresham approved a rental housing inspection program in December 2007 and began implementation immediately. The code and program addresses both the interior and exterior of units with a concentration on interior fire/life/safety violations.</p> <p>In FY 09-10, Gresham's housing inspection program resolved 2,140 cases.</p>
<p><b>Code Enforcement</b> - Dedicate a Gresham housing inspector to enforce its exterior habitability code.</p>	<p>City of Gresham:</p>	<p>See above.</p>
<p><b>Increased Code Enforcement and Fines</b> – Work in the City of Portland to increase enforcement.</p>	<p>City of Portland:</p>	<p>The Quality Rental Housing Workgroup (QRHW) discussed above addressed this recommendation. The number of rental inspectors has declined over the last five years?</p>
<p><b>Mitigate impact of investments that cause displacement with planning and coordination.</b></p>	<p>City of Portland</p>	<ul style="list-style-type: none"> <li>• Sustainable Communities Regional Grant</li> <li>• METRO Regional Housing Inventory</li> <li>• Portland Plan</li> <li>• Comprehensive Plan update</li> </ul>

<p><b>Tax Increment Finance Affordable Housing Set Aside</b> Retain local funding for affordable housing development. The main source of local housing development funds come from tax increment financing.</p>	<p>City of Portland</p>	<p>The TIF set-aside ordinance was renewed. Gresham and other cities are looking at ways to devote economic development and infrastructure resources to affordable housing.</p>
<p><b>Partner to ensure investments are made equitably</b></p>	<p>City of Portland</p>	<p>METRO is leading multiple jurisdictions in a joint grant to study regional disparities, plan investments that result increased access to opportunity and implement a pilot project.</p>

## Housing Programs

During the FY 2010-2011 the Consortium allocated \$21,860,756 of its CDBG, HOME, HOPWA and ESG entitlement resources to the development of affordable housing and housing related services. Housing programs included both capital for housing development and services related to housing. The major focus of the programs is the development of housing affordable to low- and moderate-income households.

The PHB contracts directly with nonprofit, community-based, and/or private organizations to provide other housing activities including:

- Homebuyer programs,
- Special needs housing and
- Housing-related access and stabilization activities.

Homebuyer Programs funded by the PHB include homebuyer education and counseling for first time purchasers

Housing-related services include information and referral to those in need of affordable housing; assistance with minor home repairs; and fair housing information for low- and moderate-income households.

All funding allocations for housing development and housing services are made according to priorities identified in the Consolidated Plan.

Within **Priority One** are programs to provide affordable rental housing for homeless individuals or families and very low-income households (earning less than 50% MFI) that pay more than 50 percent of their income in housing related expenses. This includes people with special needs such as mental and physical disabilities, people with AIDS, and the elderly. There is a preference for programs that serve extremely low-income (0-30%) households, including large families (2 plus bedrooms).

Within **Priority Two** are programs to provide assistance for very low-income existing homeowners to maintain their homes. Programs should preserve the stock of affordable housing and stabilize neighborhoods by providing basic support services such as case management, job training, childcare, and education. Programs should provide funds for the rehabilitation and maintenance of basic systems (plumbing, structural, electrical, and roofs) and for improvements to allow elderly and persons with disabilities to remain in their homes. Programs to revitalize severely distressed public housing are also included.

Within **Priority Three** are programs to assist first-time homebuyers. These programs should focus on innovative types of housing and lower-income populations unable to access the increasingly unaffordable market. Homebuyer programs should also be targeted as an important community development tool to reinvest in and stabilize neighborhoods. Public funding of these programs should emphasize the leveraging of private funding.

In addition to the Priorities described above, local principles have been established that provide further guidance on how affordable rental housing programs will be developed. These policies distribute federal rental housing dollars to create units that are affordable to the full range of households with incomes from below 30 percent to 80 percent of area median income. Additional resources are used to fund housing opportunities for moderate-income households.

## **2010-2011 PHB Home Owner Programs and Services (HOPS)**

Priority Three of the 2010-11 Action Plan delineates the rationale for PHB Home Owner Programs and Services:

“Engage households with incomes up to 80% MFI in wealth-building strategies, including land-trusts and first time homeownership programs, for populations that have traditionally faced barriers to homeownership.”

PHB’s own strategic plan has the following goals and strategies that pertain to HOPS:

- “Meet Portland’s need for quality, affordable homes, for its residents,” and specifically:
  - “Increase the ability of low-income, minority households to access homeownership opportunities;” and
- “Ensure equitable access to housing.”

During FY 2010-11, the City of Portland funded four HOPS activities with CDBG monies:

- A homebuyer fair;
- homebuyer education and counseling, including outreach, financial fitness and the Individual Development Account Program (IDA: matched savings program);
- direct homebuyer financial assistance; and
- homeowner retention counseling and case management.

The first three activities address barriers to homeownership, including lack of savings, lack of credit, high income-to-debt ratios, high housing prices, culturally insensitive information, and lack of knowledge about the home buying process. The fourth activity helped low to moderate income seniors—primarily from communities of color—retain their homes to prevent a widening of the minority homeownership gap.

Programs through Proud Ground (the Community Land Trust), Habitat for Humanity, HOST Development, and MHAC (the Minority Homeownership Assistance Collaborative) helped households address some or all of these barriers. [Before the 2010-11 fiscal year, MHAC was composed of three community based non-profit organizations: Hacienda CDC, Portland Community Reinvestment Initiative (PCRI,) and the African American Alliance for Homeownership (AAAH). In 2010-11 the Native American Youth and Family Center (NAYA Family Center) joined MHAC.]

An additional \$490,000 in local monies was available to fund similar activities with the organizations mentioned above, as well as with APICIA (Asian and Pacific Islander Community Improvement Association) and the Portland Housing Center (PHC). A portion of these local dollars funded 3 additional homeownership fairs targeting communities of color and low income home buyers and homeowners.

Finally, \$692,500 of local funds were available for use as direct homebuyer acquisition and rehab loans made directly by PHB to clients recruited, screened, and educated by MHAC and Habitat for Humanity.

PHB continued using Neighborhood Stabilization Program (NSP) funds, providing almost \$1,380,000 to Habitat for Humanity to acquire a foreclosed property on which it will build 45 homes. The coalition of Proud Ground and NAYA Family Center received a

rehab loan of over \$376,000 in NSP funds to rehabilitate the five homes purchased with \$790,900 in NSP dollars at the end of the 2009-10 fiscal year and the beginning of 2010-11.

The following table outlines the CDBG and ADDI funded programs. Program descriptions follow.

Program and Eligibility	Outcomes	Barrier Addressed	Providing Agency	Funding Source	Product Activity
<b>Homebuyer Fair</b>	<ul style="list-style-type: none"> <li>• 176 people attended the fair.</li> <li>• 41 (estimated) people attended a fair workshop.</li> <li>• 2 \$1,000 down payment assistance grants given.</li> <li>• # of attendees who became homeowners—to be reported 7/25/12. (2009-10 fair produced 1 new homeowner.)</li> </ul>	lack of knowledge, and culturally insensitive information	Hacienda CDC	CDBG	Culturally sensitive information and referral for potential homebuyers.
<b>Home Buyer Education and Counseling</b>	<p><b>MHAC's 2009-10 contract, extended to June 30, 2011, in part with CDBG funds:</b></p> <ul style="list-style-type: none"> <li>• 97 individuals counseled</li> <li>• 92 individuals attended home buyer ed classes.</li> <li>• 32 households opened an IDA (matched savings acct.)</li> <li>• 13 households at or below 80% MFI purchased homes.</li> </ul> <p><b>MHAC's 2010-11 contract, in part with CDBG funds:</b></p> <ul style="list-style-type: none"> <li>• 305 homebuyer clients assessed;</li> <li>• 362 homebuyer counseling sessions;</li> <li>• 52 graduated from financial literacy ed.</li> <li>• 95 graduated from homebuyer ed classes</li> <li>• 19 homebuyers at or below 80% MFI purchased a home (without MHAC financial assistance)</li> </ul> <p><b>Proud Ground, 2008-09 contract extended to 12/31/10, in part with CDBG funds:</b></p> <ul style="list-style-type: none"> <li>• 340 people attended orientation sessions on the land trust model.</li> <li>• 93 households received one on one home buyer counseling and joined the wait list for a permanently affordable home.</li> </ul> <p><b>Proud Ground, 2009-10 contract extended to 6/30/11, in part with CDBG funds:</b></p> <ul style="list-style-type: none"> <li>• 289 people attended orientation sessions on the land trust model.</li> <li>• 42 households received one on one home buyer counseling and</li> </ul>	Access to a continuum of culturally sensitive homebuyer services and assistance	MHAC, Proud Ground	CDBG and City Funds	Support of potential homebuyers throughout the process until they become homeowners

Program and Eligibility	Outcomes	Barrier Addressed	Providing Agency	Funding Source	Product Activity
	<p>joined the wait list for a permanently affordable home.</p>				
<p><b>Financial Assistance</b></p>	<p><b>Habitat:</b></p> <ul style="list-style-type: none"> <li>• Provided \$10,000 in a down payment assistance grant to help create a first time homeowner.</li> </ul> <p><b>HOST</b> 08-09 contract extended to 12/31/10:</p> <ul style="list-style-type: none"> <li>• Provided down payment assistance to help 2 households become homeowners.</li> </ul> <p><b>Proud Ground</b>, 2008-09 contract extended to 12/31/10, with ADDI funds:</p> <ul style="list-style-type: none"> <li>• 10 households bought permanently affordable homes with Proud Ground (&amp; another 8 became homeowners without PHB financial assistance.)</li> </ul> <p><b>MHAC's</b> 2009-10 contract, extended to 6/30/11:</p> <ul style="list-style-type: none"> <li>• 3 households purchased homes with financial assistance of \$3,000 to \$5,000 from MHAC.</li> </ul> <p><b>MHAC's</b> 2010-11 contract:</p> <ul style="list-style-type: none"> <li>• No funds were spent, and no homeowners assisted with federal funds.</li> </ul> <p><i>Proud Ground's 2010-11 contract was extended to 6/30/12 because of a PHB delay with rehabbing the homes for which the financial assistance had been designated.</i></p>	<p>Affordability gap</p>	<p>Habitat, HOST, MHAC, and Proud Ground,</p>	<p>HOME (ADDI), CDBG, and private resources</p>	<p>Deferred forgivable loans or grants for down payment assistance at 0% interest</p>
<p><b>North/Northeast Home Retention (Foreclosure Prevention)</b></p>	<ul style="list-style-type: none"> <li>• Counseled 106 individuals (87 households), &amp; 81 clients were over 55 years of age and at or below 80% MFI;</li> <li>• Organized 8 community partner meetings;</li> <li>• As of 6/30/11, 48 of 49 households assisted before Jan 2011 were still in their homes.</li> </ul>	<p>High debt-to-income ratios, culturally insensitive information, and a lack of knowledge about foreclosure and available resources.</p>	<p>MHAC</p>	<p>CDBG</p>	<p>Counseling, case management, and education and referral</p>

**Homebuyer Fair**

Hacienda CDC provided a homebuyer fair targeted to Latino communities that included homebuyer education and foreclosure prevention workshops, as well as access to a wide range of non-profit and for-profit housing industry organizations.

**Education and Counseling**

CDBG funding provided to the Minority Homeownership Assistance Collaborative (MHAC) helped provide HUD approved homebuyer education classes and one on one counseling services.

**Portland Land Trust**

Funding provided to Proud Ground, a Portland land trust, helped provide the staffing for acquisition activities for permanently affordable homes, the outreach and education necessary to help create new low income homeowners, and the ability to provide financial assistance to Proud Ground homebuyers.

**Financial Assistance**

MHAC's 2009-10 contract, extended to June 30, 2011, assisted 3 households below 80% MFI become first time homeowners with \$3,000 to \$5,000 in CDBG funds for 0% interest, forgivable down payment assistance loans. MHAC was unable to spend any federal funds to provide direct financial assistance in 2010-11.

HOST assisted 2 homebuyers with \$5,600 & \$5,670 forgivable loans through its extended 2009-2010 contract.

[Proud Ground spent federal funds to provide two homebuyers financial assistance grants of \$7,000 and 7,620, but PHB extended the contract and consequently has not yet reported this data.]



## Homeowner Housing Rehabilitation

An important component of the affordable housing program is to ensure that elderly and disabled homeowners can access assistance for repairs that allow them to live safely in their homes. To promote this, the City of Portland used CDBG dollars to fund small-scale or emergency rehab activities for single family, owner-occupied units. During the fiscal year 2010-2011, 1,408 households below 80% MFI were served.

Rehab activities comply with all federal environmental review and lead-based paint requirements. All households that were assisted under this program received the EPA pamphlet "Protect Your Family from Lead in Your Home" and all activities were conducted using contractors trained in lead-safe work practices. Rehab activities in pre-1978 housing that disturbed lead painted surfaces beyond the *de minimus* threshold defined by HUD received a clearance test to determine that no hazardous lead dust remained in the unit.

The following table inventories the emergency or small-scale rehab grants delivered by community organizations that received CDBG resources.

### 2010-2011 Owner Occupied Rehabilitation Services- Portland

Service	Provider	Households Served
Accessibility improvements for households with a disabled family member and minor home repair for mobile home owners.	Unlimited Choices, Inc.	Adapt-A-Home 33
		Mend-A-Home 24
		Add-A-Bar 37
Painting and minor home repair for low-income households. Repairs to address environmental hazards that may cause or exacerbate health issues.	REACH CDC	Home Repair 88
		Healthy Homes 40
Home repair services to low-income families.	Rebuilding Together	Home Repair 57
Energy conservation workshops and weatherization materials installed in disabled and elderly households.	Community Energy Project	Workshops 740
		Weatherization 188
		Emergency Repair 183
Critical need home repair loans	Portland Housing Bureau	18
<b>TOTAL</b>		<b>1,408</b>

## **Rental Housing**

### **Multi-Family Housing Development**

Increasing the availability of affordable rental housing is Priority One in the Consolidated Plan. As in past years, the Portland Housing Bureau (PHB) implemented the Rental Housing Loan Program to develop, rehabilitate, and preserve affordable rental housing. Pursuant to local housing policy, federal rental housing resources were distributed to create units affordable to households earning at or below 30 percent and up to 80 percent of area median income. Additional resources were used to develop housing affordable to moderate-income households.

The Rental Housing Loan Program budget used HOME and CDBG funding and prioritized development that (a) leveraged non-local funding sources such as Low-Income Housing Tax Credits, State and County funding, and private resources and (b) development that included Permanent Supportive Housing (PSH) units pursuant to the City's Ten Year Plan to End Homelessness. Nonprofit and for-profit developers and the Housing Authority of Portland participated as partners in enhancing the City's stock of affordable rental housing.

In the 2010-2011 Consolidated Action Plan, Portland proposed to use HOME and CDBG resources to support the acquisition, refinancing, new construction, and/or rehabilitation.

The brief summary below reflects 2010-2011 NOFA awardees. HOME, CDBG, Section 108 and City Tax Increment Financing (TIF) funds were allocated to support these efforts from the base fiscal year budget. These resources were awarded through a competitive Notice of Availability of Funding (NOFA) process.

The Portland Housing Bureau (PHB) announced an investment of \$9.8 million in affordable rental housing serving several neighborhoods throughout Portland in February 2011.

In the fall of 2010, PHB invited developers to send proposals for available funds for new construction projects or to repair existing housing that serve low-income families and individuals. PHB received a total of 12 proposals requesting almost \$24 million.

The winning proposals will build 178 new quality rental homes and repair another 74 quality affordable units. Of the \$9.8 million awarded to local projects, \$1.87 million are sourced from federal HOME grants, while \$7 million comes from tax increment funds from the Lents Town Center and Gateway urban renewal areas.

Priority was given to projects that make rental units affordable to households with incomes below 50% Median Family Income (MFI), which equates to \$24,950 for one person. In addition to working families, many of the projects also provide permanent housing and services for seniors living on fixed incomes, people with serious and long-term disabilities, chronically homeless individuals and families experiencing homelessness.

"The quality of the proposals was very high, giving our selection advisory committee a difficult job of analyzing, comparing and making recommendations," says Margaret Van Vliet, Director, Portland Housing Bureau. "These projects will positively impact not just their neighborhoods, but also the lives of low-income individuals and families who today do not have access to the kind of housing stability and opportunity all of us desire. And

in this way, PHB and its partners will make progress towards our first priority: creating more rental housing for the poorest members of our community.”

While new units will be built through investments in this funding cycle, grants also will go toward improving existing housing stock, particularly in the Lents area. In both the Providence House and Beyer Court projects (listed below), funding will help owners address repair needs before they create safety and livability issues for the residents. “Small investments can prevent much larger capital improvements down the road,” says Van Vliet.

**Gateway/Glisan Development, \$5.9 million**

**Glisan Gateway Partners, a collaboration among Housing Development Center, REACH, Human Solutions and Ride Connection**

**Source: TIF**

The new development will build 120 units of affordable housing for low-wage workers and older adults on fixed incomes. Human Solutions will develop and manage 60 apartments for workers making less than 50% MFI, while REACH will manage 60 units of housing targeting older adults. When completed, the project’s commercial space will provide the new home for Ride Connection, a nonprofit that provides transportation options for seniors and people with disabilities. Construction on the first phase of the project is expected to begin in January 2012.

**Raymond Street Apartments, \$2.1 million**

**ROSE CDC**

**Surces: TIF and HOME**

ROSE CDC will acquire and repair a 19-unit apartment building in the Foster-Powell neighborhood, and make the units available to individuals and small families earning less than 50% MFI. Some units will be targeted to veterans experiencing homelessness, and ROSE will work with JOIN, the Veteran’s Administration, and Impact Northwest to provide supportive services.

**MLK Cook Fargo Development, \$975,000**

**Innovative Housing Inc.**

**Source: HOME**

The project will build 49 new rental apartments in the Eliot neighborhood in Northeast Portland. Twenty-three of the units will be affordable to people earning less than 60%MFI (\$29,940 for one person), while 18 units will be available to people making up to 50% MFI. The rest of the apartments will be available to those with very low-income. To provide needed supports for the most vulnerable residents, IHI is working with Luke Dorf, a community mental health provider with extensive experience coordinating mental health services for people who need them most.

**Providence House, \$375,000**

**Providence Supportive Housing**

**Source: HOME**

Providence Health & Services will receive \$375,000 to complete emergency capital repairs to the building exterior of Providence House, a 40-unit subsidized senior housing project serving some of the area’s most vulnerable residents. Providence House, built in 1995, includes housing for 39 low-income elderly households and one non-subsidized manager’s unit. Seventy percent of the households living in the building earn less than 30% MFI (\$14,950 for one person). These residents live on extremely modest fixed incomes and would have a very difficult time finding replacement housing if they were forced to leave the building.

**Beyer Court, \$330,782**

**ROSE CDC**

**Source: TIF**

Beyer Court, located in SE 92<sup>nd</sup> and Harold, is in need of new roofs, windows, ventilation units and other repairs. The property, built in the 1970's, serves low-income families in the Lents Town Center neighborhood. Rose works with Impact Northwest and Bridges to Housing to provide support services to residents.

**Holgate House, \$153,749**

**Native American Youth and Family Center (NAYA Family Center)**

**Source: TIF**

NAYA Family Center and Guardian Real Estate Services are collaborating on the construction of Holgate House, Portland's first modular multi-family affordable housing project. Located in the Lents neighborhood, the project will build nine new units of affordable housing for previously homeless families, special-needs young mothers referred by NAYA and others, and tenants with extremely low incomes. The project will also receive nine project-based Housing Choice Vouchers from the Housing Authority of Portland.

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This rehab project will preserve 106 units of affordable housing with Median Family Income (MFI) under 30% through the Section 8 Project Vouchers. It is an alcohol and drug free environment that will be targeted towards chronically homeless.

**Mark O Hatfield Building - 204 SW 8<sup>th</sup>, CDBG \$ 846,727**

MFI	Total Units	SRO	Studio	1 BR	2BR	3 BR	4 BR
0-30	0		0	0	0	0	0
31-50	106	102	4	0	0	0	0
51-60	0	0	0	0	0	0	0
61-80	0	0	0	0	0	0	0
<b>Total</b>	<b>106</b>	<b>102</b>	<b>4</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

**Rental Units: under rehab, under construction, in lease- up phase or completed in FY 2010-2011 (Households 30%-80% MFI)**

Name	Type	PSH	Units	0-30%	30-50%	51-60%	61-80%	81+
Rockwood	New Construction	15	47	0	32	15	0	0
Upshur House	Rehabilitation	29	30	0	0	30	0	1
Villa de Suenos	Rehabilitation	0	28	28	0	0	0	0
Briarwood East	Rehabilitation	0	22	0	0	22	0	0
Taggart Manor	Rehabilitation	0	24	6	17	0	0	1
PCRI	Rehabilitation	0	4	0	4	0	0	0
Uptown Tower Apts	Rehabilitation	0	72	71	0	0	0	1
Ainsworth Court Apts	Rehabilitation	0	88	0	0	88	0	0
Rosewood Apts	Rehabilitation	0	26	26	0	0	0	0
Luke Dorf-Sandy Apartments	Rehabilitation	67	67	0	26	24	17	0
Hewitt Place	Rehabilitation	12	44	0	0	44	0	0
Arbor Glen	Rehabilitation	0	97	0	0	97	0	0
Roselyn Apartments	Rehabilitation	0	31	0	2	29	0	0
Walnut Park	Rehabilitation	0	38	0	38	0	0	0
Eastgate Station	New Construction	10	61	7	33	21	0	0
Sandy Apartments	Rehabilitation	67	67	0	26	41	0	0
Otesha Place	New Construction	0	11	5	6	0	0	0
Los Jardines	Rehabilitation	0	43	0	37	6	0	0
Tistilal Village	Rehabilitation	0	34	7	21	6	0	0
Nelson Court	Rehabilitation	0	7	0	7	0	0	0
Ceel Ocks Manor	Rehabilitation	0	3	0	1	1	1	0
Kehilla House	New Construction	0	14	0	14	0	0	0
CSI Facility	New Construction	0	4	0	4	0	0	0
<b>Totals</b>	-----	<b>200</b>	<b>862</b>	<b>150</b>	<b>268</b>	<b>424</b>	<b>18</b>	<b>3</b>

**Sandy Apartments – Project is Closed in IDIS**

The Sandy Apartments is a rehabilitation project. It is a 100 percent PSH project and all units will be reserved for chronically mentally ill adults who are at risk of homelessness. Two units will also be reserved for residents who have HIV and mental illness. Affordability Period is 60 years.

**Sandy Apartments - 11401 NE Sandy Blvd - CDBG funds \$1,272,410**

MFI	Total Units	SRO	Studio	1 BR	2BR	3 BR	4 BR
0-30	0	0	0	0	0	0	0
31-50	26	0	6	20	0	0	0
51-60	41	0	0	24	17	0	0
61-80	0	0	0	0	0	0	0
<b>Total</b>	<b>67</b>	<b>0</b>	<b>6</b>	<b>44</b>	<b>17</b>	<b>0</b>	<b>0</b>

**Hewitt Place – Project is complete and closed in IDIS**

The property is developed as eleven four-plex buildings and is designed to blend into its predominantly single-family neighborhood. There are a total of 44 units: 43 three-bedroom townhouse units and one one-bedroom unit. In addition to the renovation, IHI will create a community space from one of the three bedroom units. This involves transforming the ground floor to a community area and manager’s office and creating a one-bedroom living unit upstairs. The addition of the community space will greatly enhance the delivery of services to the Hewitt Place residents. 12 PSH Units

**Hewitt Place Townhomes - 846 SE 29<sup>th</sup> Ave., Troutdale, OR., CDBG-R \$686,494**

MFI	Total Units	SRO	Studio	1 BR	2BR	3 BR	4 BR
0-30	0	0	0	0	0	0	0
31-50	0	0	0	0	0	0	0
51-60	0	0	0	1	0	43	0
61-80	0	0	0	0	0	0	0
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>43</b>	<b>0</b>

**Arbor Glen Apartments – Project is complete and closed in IDIS**

The scope of work for the \$140,000 in CDBG-R funds awarded to Arbor Glen will primarily be used to conduct site work and landscaping at this 97-unit apartment complex. The majority of the site is currently without adequate landscaping and many surface areas at the property consist primarily of exposed dirt and rock.

<b>Glen Arbor Apartments - 2609 SE 145<sup>th</sup> Street, CDBG-R \$140,000</b>							
AMI	SRO	Studio	1 BR	2 BR	3 BR	4 BR	Total
0-30%	0	0	0	0	0	0	0
31-50%	0	0	0	0	0	0	0
51-60%	0	0	4	52	41	0	97
61-80%	0	0	0	0	0	0	0
81+%	0	0	0	0	0	0	0
<b>Total</b>	<b>0</b>	<b>0</b>	<b>4</b>	<b>52</b>	<b>41</b>	<b>0</b>	<b>97</b>

**Roselyn Apartments** - Project is complete and closed in IDIS

Lease up phase and final disbursement pending

The Roselyn Apartments is a 31-unit expiring Section 8 apartment building serving low income seniors and persons with disabilities. The NHA sponsored project acquired and rehabilitate the building and preserved the affordability for low income senior/disabled households for the next sixty years. The building is a 3-story (including daylight basement) structure built in 1912, located on a 5,000 square foot lot in a mixed residential and commercial area of Northwest Portland. The building has controlled secure access, full elevator service, a community room, tenant storage area and common laundry.

<b>Roselyn Apartments - 424 NW 21<sup>st</sup> , Section 108 funds \$830,000</b>							
AMI	SRO	Studio	1 BR	2 BR	3 BR	4 BR	Total
0-30%	0	0	0	0	0	0	0
31-50%	0	1	1	0	0	0	2
51-60%	0	29	0	0	0	0	29
<b>Total</b>	<b>0</b>	<b>30</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>31</b>

**Walnut Park-** Project is complete and closed in IDIS

The Walnut Park Apartments is a 38-unit expiring Section 8 apartment building located in north east Portland that serves low income seniors and persons with disabilities at or below 50% of area median income. The building is within easy access to transportation, shopping, health and recreational amenities, and within one block of the Urban League Senior Services center. REACH acquired the building from the current owners and renewed the Project Based Section 8 contract in order to preserve the affordability for low income senior/disabled households for another 20 years. Built in 1981, Walnut Park is a 26,400 square foot 3-story building that has been relatively well maintained.

<b>Walnut Park - 5272 NE 6<sup>th</sup> , Section 108 - \$1,641,000</b>							
AMI	SRO	Studio	1 BR	2 BR	3 BR	4 BR	Total
0-30%	0	0	0	0	0	0	0
31-50%	0	0	38	0	0	0	38
51-60%	0	0	0	0	0	0	0
<b>Total</b>	<b>0</b>	<b>0</b>	<b>38</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>38</b>

**Eastgate Station-** Project is complete and closed in IDIS

This project will provide affordable rental housing opportunities for special needs individuals and families with income restrictions between 30% and 60% of Median Family Income (MFI). The primary target population will be family housing with ten permanent supportive housing (PSH) units targeting homeless families. The project developer is Specialized Housing Incorporated, a nonprofit provider of housing and social services.

<b>Eastgate Station - NE 120<sup>th</sup> and Burnside \$938,200 HOME w/ 8 HOME Units</b>							
AMI	SRO	Studio	1 BR	2 BR	3 BR	4 BR	Total
0-30%	0	0	0	0	7	0	7
31-50%	0	0	8	4	16	5	33
51-60%	0	0	8	4	6	3	21
<b>Total</b>	<b>0</b>	<b>0</b>	<b>16</b>	<b>8</b>	<b>29</b>	<b>8</b>	<b>61</b>

This project was awarded in multiple years by multiple jurisdictions.

**The Rockwood Building** is \$19.2 million project. It will house 47 units of affordable housing – 17 units for homeless war veterans and their families and 30 for low-income residents – as well as a 25,000-square foot multi-service center for seven other agencies on 124 NE 181<sup>st</sup> Avenue, Gresham, OR Funding Source: HOME \$1,111,333

MFI	Total Units	SRO	Studio	1 BR	2BR	3 BR	4 BR
0-30	0	0	0	0	0	0	0
31-50	32	0	4	12	15	1	0
51-60	15	0	0	7	5	3	0
61-80	0	0	0	0	0	0	0
<b>Total</b>	<b>47</b>	<b>0</b>	<b>0</b>	<b>19</b>	<b>20</b>	<b>4</b>	<b>0</b>

**Upshur House Apartments** - Project is underway

Upshur House, built in 1980, is a 30 unit, affordable housing project, consisting of five two-story buildings with a mix of one, two, and three-bedroom units. The apartments are conveniently located in NW Portland near excellent schools, trolley, and an urban hub of the city known for its restaurants and shopping opportunities. The exterior facade has a mixture of 6” wood and composition siding, aluminum clad single-pane windows and decks. The common areas amenities include: laundry facilities, small courtyard, playground, and leasing office.

<b>Upshur House - 2650 NW Upshur, Section 108 \$415,000</b>							
AMI	SRO	Studio	1 BR	2 BR	3 BR	4 BR	Total
0-30%	0	0	0	0	0	0	0
31-50%	0	0	0	0	0	0	0
51-60%	0	0	8	12	10	0	30
<b>Total</b>	<b>0</b>	<b>0</b>	<b>8</b>	<b>12</b>	<b>10</b>	<b>0</b>	<b>30</b>



**Briarwood East Apartments:** Project is underway

**Project Manager: Human Solutions**

Funding will enable Human Solutions to acquire and rehab Briarwood East Apartments, a 22-unit apartment complex, originally constructed in 1974. Major rehab work is planned for the property, located in the Powellhurst-Gilbert neighborhood. Required work includes replacing all roofs, installing flashing at all windows, building playground equipment, and making several units accessible for people with disabilities. The project will also receive 10 project-based Housing Choice Vouchers.

3302 S.E. 122<sup>nd</sup> Ave. HOME \$807,215, & Section 108 \$1,254,404

MFI	Total Units	SRO	Studio	1 BR	2BR	3 BR	4 BR
0-30	0	0	0	0	0	0	0
31-50	0	0	0	0	0	0	0
51-60	22	0	0	0	7	15	0
61-80	0	0	0	0	0	0	0
<b>Total</b>	<b>22</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>7</b>	<b>15</b>	<b>0</b>

**Villa de Suenos, 6706 NE Killingsworth Avenue – Project is underway**

Villa de Sueños is a 28-unit multi-family development serving large families in hard to find 3- and 4-bedroom rental apartments. Villa de Sueños was Hacienda’s first new construction project and was completed in 1999. In 2008 water damage, mold and collapsing decks were discovered necessitating the need for extensive investigations which led to a pending lawsuit for construction defects.

The City of Portland understands the need to preserve this stock of affordable housing, particularly large units serving large families earning 50% of area median income or less. To this end, the Portland Housing Bureau is loaning HOME and CDBG/Section 108 funds to support the rehab. After rehabilitation, Villa de Sueños will provide stable, dignified, affordable housing for households with the greatest need. New covered decks and railings, improved ventilation, radiant heating and improved play spaces and landscaping are all part of the re-construction.

Site is located at 6730 NE Killingsworth Street, Portland Oregon-  
HOME Funds \$1,125,000

Units	0-30%	30-50%	51-60%	61-80%	81+
28	28	0	0	0	0
<b>Total</b>	<b>28</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

**Portland Community Reinvestment Initiatives, Inc.(PCRI)- Project is underway**  
Rehabilitate four (4) scattered sites of affordable housing located at 939 N Alberta, 8508 N Drummond, 426-28 N Mason and 8735 N. Woolsey,  
**Funding Source: CDBG-R \$707,506**

MFI	Total Units	SRO	Studio	1 BR	2BR	3 BR	4 BR
0-30	0	0	0	0	0	0	0
31-50	4	0	0	0	2	2	0
51-60	0	0	0	0	0	0	0
61-80	0	0	0	0	0	0	0
<b>Total</b>	<b>4</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>2</b>	<b>0</b>

**Otesha Place – Project is underway**

Is a (3) three-story building containing (11) eleven units of multi-family housing and 1,000 commercial space.

**Otesha Place - 4945 NE 15<sup>th</sup> - CDBG \$153,273,**

MFI	Total Units	SRO	Studio	1 BR	2BR	3 BR	4 BR
0-30	5	0	1	1	3	0	0
31-50	6	0	1	1	4	0	0
51-60	0	0	0	0	0	0	0
61-80	0	0	0	0	0	0	0
<b>Total</b>	<b>11</b>	<b>0</b>	<b>2</b>	<b>2</b>	<b>7</b>	<b>0</b>	<b>0</b>

Los Jardines Apartments-Project is underway

Built in 2002, Los Jardines consists of 43 three- and four-bedroom townhome and flat-style apartments. The project serves families earning 30 percent to 60percent of AMI. **Los Jardines Apts.**, - 5530 NE 60<sup>th</sup> - Section 108 \$400,000,

MFI	Total Units	SRO	Studio	1 BR	2BR	3 BR	4 BR
0-30	0	0	0	0	0	0	0
31-50	37	0	0	0	0	27	10
51-60	6	0	0	0	0	0	6
61-80	0	0	0	0	0	0	0
<b>Total</b>	<b>43</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>27</b>	<b>16</b>

**Taggart Manor, 8066 SE Taggart Street, Portland OR** – Project is underway

Taggart Manor is one of 20 residential buildings in Central City’s inventory. Built in 1960, it’s also one of the oldest properties. Since acquiring it eight years ago, Central City has little opportunity to upgrade it. The funds will be used to increase attic insulation to R-60, replace water heaters, install energy efficient windows and replace a 15-year, composition roof with a 50-year metal one.

\$301,750 in CDBG-R

Units	0-30%	30-50%	81+
24	6	17	1
Total	6	17	1
<b>Total</b>	<b>6</b>	<b>17</b>	<b>1</b>

**Uptown Tower Apartments** - Project is underway

Affordable housing for seniors and disabled residents looking for an independent lifestyle within walking distance to eclectic dining, shopping and entertainment venues. Uptown Tower also has excellent access to public transportation including the Portland Street Car and Tri-Met System. Residents will enjoy handsomely-restored exterior improvements and brand new interiors including new cabinetry, new flooring, new countertops and energy efficient appliances in select homes.

712 Southwest Saint Clair Avenue

Units	0-30%	61-80%	81+
72	71	0	1
<b>Total</b>	<b>71</b>	<b>0</b>	<b>1</b>

**Ainsworth Court Apartments**-Project is underway

Home Forward (aka) Housing Authority of Portland received \$1.4 million in HOME funds for Ainsworth Court to replace the hot water system and upgrade the bathrooms.

**1515 N Ainsworth Street**

Units	51-60%
88	88
<b>Total</b>	<b>88</b>

**Rosewood Apartments** – Project is complete and closed in IDIS

Rose Wood Apartments is an existing circa 1955 building that contains 36 units of affordable rental housing located at 4810 NE Sandy Blvd. The project was acquired by the non-profit Central City Concern (CCC) in 1997. Rose Wood Apartments provides a supportive alcohol and drug free community for low income and formerly homeless people living with HIV/AIDS. Upon acquisition by CCC in 1997, the Rose Wood transformed a marginal motel which was a neighborhood problem into an attractive building which was welcomed and supported by the surrounding community. The rehabilitation addresses current deficiencies with the building including the roof, site drainage, plumbing, building exterior, ventilation, and landscaping.

<b>Rosewood Apartments - 4810 NE Sandy BLVD., HOPWA \$657,000</b>							
AMI	SRO	Studio	1 BR	2 BR	3 BR	4 BR	Total
0-30%	0	13	13	0	0	0	26
31-50%	0	0	0	0	0	0	0
51-60%	0	0	0	0	0	0	0
<b>Total</b>	<b>0</b>	<b>13</b>	<b>13</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>26</b>

**NAYA/SAWASH** – Project is underway

The Sawash Housing LLC – a single asset entity created by the Native American Youth Association (NAYA), its sole member. The three rental housing properties comprised of 44 housing units all in properties are located in Portland, Oregon.

The Properties are located in north Portland and include a 34-unit project built in 1973, Nelson Court is a seven-unit project built in 1998, and Ceel Ocks is a three-unit project built in 1995. Affordability Period is 60 years.

<b>Tistilal Village</b> 7602-7622 N. Gloucester Avenue							
AMI	SRO	Studio	1 BR	2 BR	3 BR	4 BR	Total
0-30%	0	0	0	7	0	0	7
31-50%	0	0	0	21	0	0	21
51-60%	0	0	0	6	0	0	6
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>34</b>	<b>0</b>	<b>0</b>	<b>34</b>

<b>Nelson Court</b> 9807-9837 N. Taft Avenue							
AMI	SRO	Studio	1 BR	2 BR	3 BR	4 BR	Total
0-30%	0	0	0	0	0	0	0
31-50%	0	0	0	2	5	0	7
51-60%	0	0	0	0	0	0	0
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>5</b>	<b>0</b>	<b>7</b>

<b>Ceel Ocks Manor</b> 9037 N Central Street							
AMI	SRO	Studio	1 BR	2 BR	3 BR	4 BR	Total
0-30%	0	0	0	0	0	0	0
31-50%	0	0	0	0	1	0	1
51-60%	0	0	0	0	1	0	1
61-80%	0	0	0	0	1	0	1
<b>Total</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>3</b>	<b>0</b>	<b>3</b>

**Facilities:**

**Halsey Center-** Project is complete and closed in IDIS

**The Halsey Project: \$650,000-Section 108**

**Project Manager: JOIN**

Funding allows JOIN to refinance the recently acquired and remodeled resource center located at 1435 NE 81st Ave., as well as complete further upgrades. The building provides basic services for homeless and recently homeless individuals and families, and serves as the offices for JOIN's street outreach and permanent housing placement team.

Kehilla House, will feature 14 apartments at Cedar Sinai Park (CSP) for adults with developmental disabilities. The project is a collaboration between CSP, which will manage the property, and Jewish Family and Child Service, which will provide support services and intake.

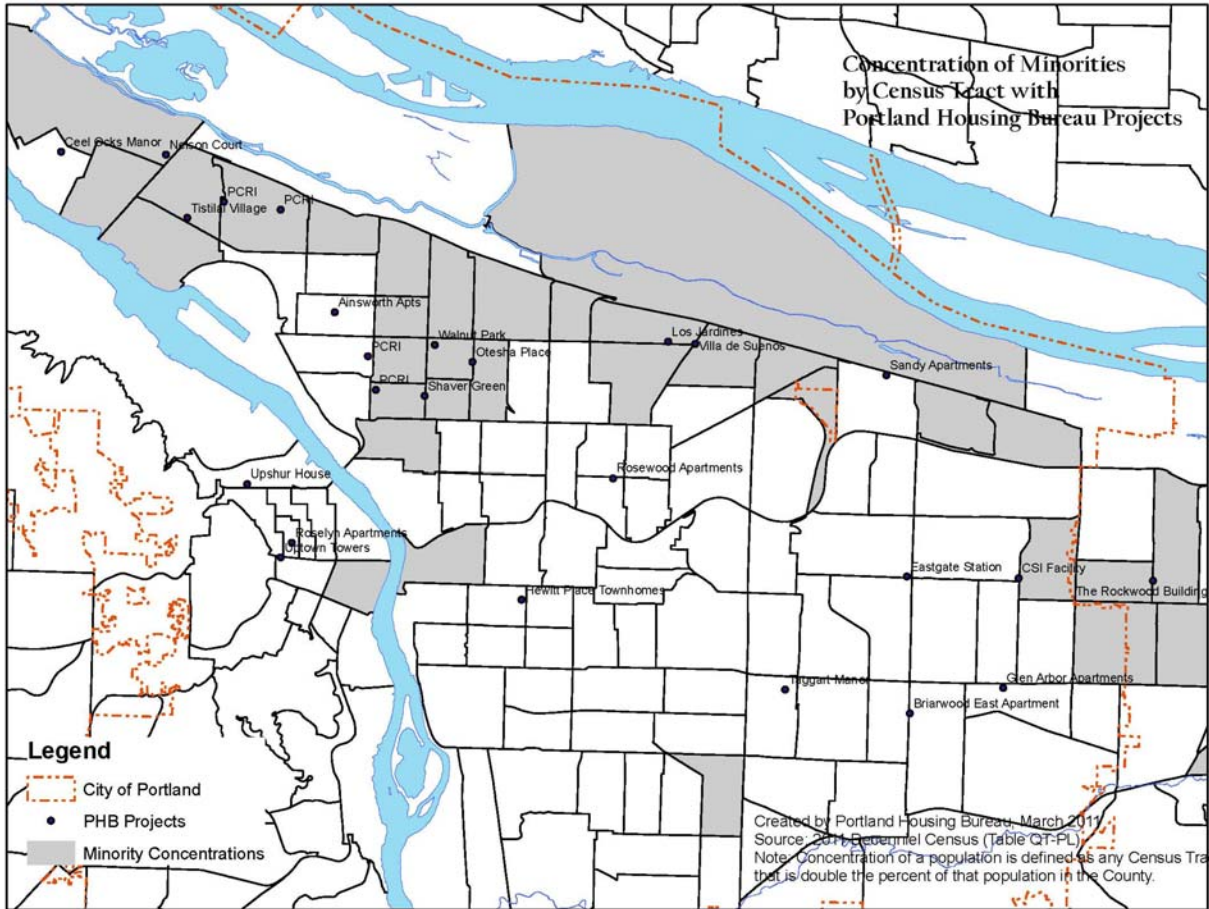
<b>Kehillah House - 6125 SW Boundry Street - CDBG \$275,000</b>							
MFI	Total Units	SRO	Studio	1 BR	2BR	3 BR	4 BR
0-30	0	0	0	0	0	0	0
31-50	14	0	0	14	0	0	0
51-60	0	0	0	0	0	0	0
61-80	0	0	0	0	0	0	0
<b>Total</b>	<b>14</b>	<b>0</b>	<b>0</b>	<b>14</b>	<b>0</b>	<b>0</b>	<b>0</b>

**CSI-Facility – Project is underway**

Developmental Disable Adult Foster Care facility, an acquisition of a house to be redeveloped into a group home, licensed by the State, for developmentally disabled adults.

**CSI Facility - 55 NE 148 Avenue, CDBG \$215,000**

MFI	Total Units	SRO	Studio	1 BR	2BR	3 BR	4 BR
0-30	0	0	0	0	0	0	0
31-50	4	0	0	4	0	0	0
51-60	0	0	0	0	0	0	0
61-80	0	0	0	0	0	0	0
<b>Total</b>	<b>4</b>	<b>0</b>	<b>0</b>	<b>4</b>	<b>0</b>	<b>0</b>	<b>0</b>



**CITY OF GRESHAM and MULTNOMAH COUNTY  
MULTI-FAMILY HOUSING DEVELOPMENT**

The Rockwood Building located at 124 NE 181<sup>st</sup> Avenue, Gresham, Oregon. The development will house 47 units of affordable housing – 17 units for homeless war veterans and their families and 30 units for low-income residents – as well as a 25,000 square foot multi-service center for seven other non-profit agencies. HOME funds were used to finance the development in the amount of \$1,771,333. All three jurisdictions contributed HOME funds to the project. See table below.

<b>Jurisdictions</b>	<b>FY</b>	<b>HOME Funds</b>
<b>City of Gresham</b>	2007	\$600,000
<b>Multnomah County</b>	2008	\$600,000
<b>City of Portland</b>	2008	\$511,333
<b>Total HOME Dollars</b>		<b>\$1,711,333</b>

On August 24, 2010, The Rockwood Building had their groundbreaking. Construction is slated to start in September 2010.



## Permanent Supportive Housing

Beyond meeting all accessibility guidelines that apply to its development of federally-funded affordable housing, The Consortium is not currently developing housing specifically targeted for non-homeless disabled persons, since the City has committed to meet the PSH goals in the 10 year plan. The Consortium funds rent assistance programs that serve, among others, non-homeless disabled and elderly persons. Further, most of the projects produced with Consortium's funding include both PSH and non-PSH affordable units - some of which are accessible - and some of which will be occupied by non-homeless households that include a member with a disability.

In addition, the Consortium determined in its recent Analysis of Impediments to Fair Housing that the current supply of accessible rent-restricted units is under-utilized, primarily because there is no market that connects owners of accessible rental units with people with disabilities who would like to rent accessible units. Instead, standard practice is that an owner will rent accessible subsidized apartments to any applicant that meets its criteria for tenancy. Apartment listings on HousingConnections.org, a free regional web-based affordable housing locator, may indicate whether a unit is accessible, but may not provide sufficient detail for a person with disabilities to know whether the unit would as a first step towards "making the market," the Consortium has commissioned William Wilson Architects to compile an inventory of accessible subsidized units. The inventory will include detail about the types of accessibility features available (e.g. roll in showers, accessible patio) and will feature digital photographs, where possible. The Consortium will make this information available on HousingConnections.org. In the future, the Consortium would like to explore whether owners of accessible units would be willing to participate in a voluntary program that would notify people with disabilities of vacancies in accessible units.

**The table below reflects all PHS units funded with federal funds and tax increment finance (TIF) in program year 2010.**

Units	0-30%	30-50%	51-60%	61-80%	81+
47	15	0	0	0	0
30	29	0	0	0	0
28	0	0	0	0	0
22	0	0	0	0	0
24	0	0	0	0	0
12	0	0	0	0	0
0	0	0	0	0	0
<b>Total</b>	<b>44</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

**Listed are housing projects with PSH units funded/Completed in 2010:  
Rockwood Station – 15 PSH Units  
Upshur House – 29 PSH Units**

## **Federally Funded Housing Projects in Minority Concentrated Areas**

### **Public Housing: Portland Housing Authority**

The Consortium is required to submit a comprehensive annual report to HUD on all agency activities and use of funds. This is a full report from the Portland Housing Authority for FY 2010. For more information on the Portland Housing Authority please see the link below.

<http://www.hapdx.org/>



# Housing Authority of Portland

YEAR 11

HUD's "Moving to Work"  
(MTW) Demonstration Program

Annual Report  
FY2010

Original submission: June 24, 2010  
Revision 1 submitted: August 18, 2010  
Final approval date: September 2, 2010

## **HAP Board of Commissioners**

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Michael Buonocore, Assistant Director, Policy and Planning  
Melissa Sonsalla, Project Coordinator

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## I. Introduction

Moving to Work (MTW) is a demonstration program that offers public housing authorities (PHAs) the opportunity to design and test innovative, locally-designed housing and self-sufficiency strategies for low-income families by allowing exemptions from existing public housing and tenant-based Housing Choice Voucher rules. The program also permits PHAs to combine operating, capital, and tenant-based assistance funds into a single agency-wide funding source, as approved by HUD.

The purposes of the MTW program are to give PHAs and HUD the flexibility to design and test various approaches for providing and administering housing assistance that accomplish three primary goals:

- Reduce cost and achieve greater cost effectiveness in Federal expenditures;
- Give incentives to families with children where the head of household is working, is seeking work, or is preparing for work by participating in job training, educational programs, or programs that assist people to obtain employment and become economically self-sufficient; and
- Increase housing choices for low-income families.

HAP has been designated an MTW agency since 1998. Last year, we signed a new agreement with HUD that will ensure our participation in the program until 2018, providing a long horizon to test and assess new initiatives and approaches to our work in support of the MTW program's goals.

### Overview of the Agency's ongoing MTW goals and objectives

HAP recently completed a months-long outreach process to develop its next strategic plan. What we learned from talking to staff, community and jurisdictional partners, and 2,500 residents and participants was exciting: MTW has given us the opportunity to test some promising approaches to our work and there is support to build on those in the coming years. Our goals are particularly aligned with the two MTW goals of giving incentives to families to pursue self-sufficiency and to increase housing choices for low-income housing.

Our ongoing objectives in this report that we intend to build on, and add to, are embodied in activities such as agency-based assistance, which helps us make maximum use of our limited housing resource to increase choice and access by collaborating with community partners. Similarly, the Resource Access Center finds us working closely with our local jurisdictions to better meet the needs of those with multiple barriers, while our Opportunity Housing Initiative and evolving rent reform concepts will increase the availability of self-sufficiency activities.

### Overview of the Agency's MTW Activities

Activity	Description	Page
FY2010-P1: Subsidy change to preserve public housing units	Discontinued.	15
FY2010-P6: Family eligibility for project-based voucher assistance	In order to provide greater access to low-income families with high barriers, screening and eligibility requirements at certain project-based voucher properties may differ from traditional criteria.	15

Activity	Description	Page
FY2010-P2: Opportunity Housing Initiative at New Columbia	HAP has implemented a five-year family self-sufficiency program for families either living in public housing or receiving Section 8 at New Columbia.	17
FY2010-P3: Agency-based rent assistance project with local non-profits	HAP has allocated a small pool of rent assistance funds to be administered by SE Works and NW Pilot Project – local non-profits serving distinct groups of participants.	19
FY2010-P4: Measures to improve the rate of voucher holders who successfully lease-up	HAP has implemented a variety of measures to improve landlord acceptance of Section 8 vouchers in the local community.	21

Activity	Description	Page
FY2010-P5: Limits for zero-subsidy participants	HAP has implemented limits for families that have a pattern of lowering their income after subsidy ends.	23
FY2010-P7: Resource Access Center development	HAP is serving as the master developer for this new facility to serve homeless and formerly homeless households.	25
FY2010-O2: Potential redevelopment of Hillsdale Terrace	Discontinued.	27
FY2010-O3: Redevelopment of Sears Military Base	Discontinued.	27
FY2010-O4: Addition of Public Housing Operating Subsidy at Affordable Housing Sites	In FY2010, HAP began offering public housing subsidy for 25 households at Rockwood Station, a 195-unit property in Gresham.	28



Activity	Description	Page
FY2010-O5: New Affordable Housing	HAP is utilizing MTW authority to exceed the traditional limit of a 25% cap on the number of project-based voucher units at The Jeffrey and the Martha Washington.	29
FY2010-O6: Redevelopment of University Place	Discontinued.	30
FY2010-O7: Opportunity Housing Initiative	HAP operates OHI self-sufficiency programs site-based at Fairview Oaks and Humboldt Gardens, and through a collaborative program with the Oregon Department of Human Services (DHS).	31
FY2010-O8: Biennial reviews – Rent Reform Activity	HAP has implemented a biennial review schedule for all MTW voucher holders in Section 8, and for elderly/disabled residents in public housing.	35
FY2010-O9: Biennial inspections	HAP conducts biennial inspections for qualifying Section 8 households.	36
FY2010-O10: Simplified administrative procedures – Rent Reform Activity	HAP has implemented several measures to relieve administrative burden and reduce intrusiveness with residents and participants.	37

## II. General Housing Authority Operating Information

### A. Housing Stock Information

<b>Number of public housing units at the end of FY2010</b>	
Elderly/Disabled Units	1,345
Family Units	<u>1,261</u>
<b>Total</b>	<b>2,606</b>

### Change in number of public housing units in FY2010

Units added during FY2010	25
Units removed during FY2010	<u>(37)</u>
<b>Cumulative Change</b>	<b>-12 (-0.5%)</b>

### Breakdown of Public Housing Units at the end of FY2010

	Bedroom Size				Total Households
	Studio/ 1 BR	2BR	3BR	4+BR	
Elderly/Disabled Units	1,331	14	0	0	1,345
Family Units	189	526	431	115	1,261
<b>Total</b>	<b>1,520</b>	<b>540</b>	<b>431</b>	<b>115</b>	<b>2,606</b>

### Units added in FY2010

Development	Description	Units
Rockwood Station	Two bedroom apartments; two are accessible units	25
<b>Total Units added in FY2010</b>		<b>25 units</b>

### Planned vs. actual changes to housing units

In addition to the 25 units added to Rockwood Station, HAP's FY2010 Plan proposed 90 more units to be added at four other properties. Units at The Jeffrey and the Martha Washington are now expected to be brought online in FY2011. Units at the Resource Access Center will be brought online in FY2012. Lastly, HAP is no longer planning to add any public housing units to Pine Square.

## FY2010 Capital Expenditures

Community	Activity	ARRA	Capital Fund	% of Cap Fund	Total Expended	% of Total Expended
Cora Park	Flooring, heating, misc upgrades	\$27,299	\$482,844	8.42%	\$510,143	5.56%
Chateau Apts	Kitchen remodel, misc upgrades	28,069	308,206	5.38%	336,275	3.66%
Bel Park	Kitchen remodel, heating, plumbing, energy improvements, misc upgrades	357,289	64,924	1.13%	422,213	4.60%
Camellia Court	Kitchen remodel, heating, plumbing, energy improvements, misc upgrades	480,141	79,361	1.38%	559,502	6.09%
Winchell Court	Energy improvements, misc upgrades	241,327	56,125	0.98%	297,452	3.24%
Tillicum North	Energy improvements, misc upgrades	12,342	116,599	2.03%	128,941	1.40%
Tillicum South	Energy improvements, misc upgrades	12,134	100,001	1.74%	112,135	1.22%
Hunter's Run	Energy improvements, misc upgrades	12,009	102,042	1.78%	114,051	1.24%
Harold Lee Village	Energy improvements, misc upgrades	12,083	91,903	1.60%	103,986	1.13%
Alderwood	Comprehensive renovation	50,987	965,404	16.84%	1,016,391	11.07%
Powellhurst Woods	Comprehensive renovation	49,867	1,669,155	29.11%	1,719,022	18.72%
Cello Court	Comprehensive renovation	4,325	78,119	1.36%	82,444	0.90%
Demar Downs	Comprehensive renovation	400,885	334,318	5.83%	735,203	8.01%
Stark Manor	Comprehensive renovation	479,546	302,411	5.27%	781,957	8.52%
Fir Acres	Comprehensive renovation	878,239	386,542	6.74%	1,264,781	13.77%
Townhouse Terrace	Comprehensive renovation	253,950	402,945	7.03%	656,895	7.15%
Gallagher	Comprehensive renovation	22,113	26,441	0.46%	48,554	0.53%
Lexington Court	Comprehensive renovation	-	11,614	0.20%	11,614	0.13%
Carlton Court	Comprehensive renovation	-	13,439	0.23%	13,439	0.15%
Eastwood Court	Comprehensive renovation	-	16,501	0.29%	16,501	0.18%
Sellwood Center	Comprehensive renovation	-	1,600	0.03%	1,600	0.02%
Holgate House	Comprehensive renovation	-	307	0.01%	307	0.00%
Eliot Square	Comprehensive renovation	-	10,761	0.19%	10,761	0.12%
Sweet 16 Project	Administrative Costs	125,557	-	0.00%	125,557	1.37%
Hollywood East	Window Replacement	-	39,523	0.69%	39,523	0.43%
Various properties	Misc abatement	-	72,926	1.27%	72,926	0.79%
<b>Total Capital Expenditures</b>		<b>\$3,448,162</b>	<b>\$5,734,012</b>	<b>100.00%</b>	<b>\$9,182,174</b>	<b>100.00%</b>

**Units removed in FY2010**

<b>Development</b>	<b>Justification</b>	<b>Units</b>
Scattered Sites:	HUD approved disposition of scattered sites, as first described in our FY2008 MTW Plan	3
OR002032		6
OR002036		4
OR002044		7
OR002048		9
OR002049		8
OR002050		
<b>Total Units removed in FY2010</b>		<b>37 units</b>

**Overview of other housing managed by the Agency:**

	<b>Number of Properties</b>	<b>Physical Units</b>
Affordable Owned with PBA* subsidy	6	496
Affordable Owned without PBA subsidy	10	1,041
<b>Total Affordable Owned Housing</b>	<b>16</b>	<b>1,537</b>
Tax Credit Partnerships	19	2,234
<b>Total Affordable Housing</b>	<b>35</b>	<b>3,771</b>
Duplicated PH Properties/Units	6	465
Special Needs (Master Leased)	36	422

\*Project-based assistance

**MTW Housing Choice Vouchers (HCV) units authorized:**

<b>MTW HCV at beginning FY2010</b>	<b>7,639*</b>
SRO/MODS converted to HCVs (Jefferson West)	50
Disaster Housing Assistance Program voucher converted to HCV	<u>1</u>
<b>MTW HCV at end of FY2010</b>	<b>7,690</b>
<b>Cumulative Change</b>	<b>+51 (+0.7%)</b>

**\*Note:** The FY2010 Plan incorrectly stated there were 7,704 HCV units authorized at the beginning of FY2010. 70 VASH vouchers (which are not MTW) were mistakenly added to the calculation, and 5 DHAP vouchers were received after submission of the Plan, but before the beginning of FY2010. [7,704 – 70 + 5 = 7,639]

**Non-MTW Housing Choice Vouchers units authorized:**

SRO/MODS at beginning of FY2010	562
Less 50 SRO/MODS converted to MTW HCV	<u>(50)</u>
<b>SRO/MODS at end of FY2010</b>	<b>512</b>
<b>Cumulative Change</b>	<b>-50 (-9%)</b>
Veteran Affairs Supportive Housing at beginning of FY2010	70
Additional vouchers awarded by HUD	<u>35</u>
<b>VASH at end of FY2010</b>	<b>105</b>
<b>Cumulative Change</b>	<b>+35 (+50%)</b>

**Discuss changes over 10%:** HUD awarded HAP an additional 35 VASH vouchers during the 2010 fiscal year based on recommendations from our VA partners.

**Housing Choice Vouchers – units project-based in FY2010:**

- Miraflores – 8 units
  - Preferences for Bridges to Housing participants and families below 50% of AMI. Services provided by Bridges to Housing program, Catholic Charities, El Programa Hispano and Morrison Family Services.
- Sacred Heart – 12 units
  - Preferences for chronically homeless singles and seniors. Services are provided by NW Pilot Project.
- Shaver Green – 8 units
  - 1-bedroom units with a preference for disabled households. Services are provided by Lifeworks Northwest via an on-site case manager who holds office hours for residents.

**B. Leasing Information**

**Total number of MTW public housing units leased in FY2010:** 2,590 units  
HAP continues to have an occupancy rate of over 98% in its public housing units.

**Total number of Non-MTW public housing units leased in FY2010:** None

**Description of issues:**  
There have been no issues with leasing public housing units in FY2010.

**Total number of MTW HCV units leased in FY2010:**

7,677 units authorized  
7,738 units leased  
100.8% utilization

**Total number of non-MTW HCV units leased in FY2010:**

SRO/MODS: 525 units authorized  
478 units leased  
91.1% utilization

Veteran Affairs Supportive Housing: 90 units authorized  
55 units leased  
61.1% utilization

**Description of issues:**  
There have been no issues with leasing MTW vouchers in FY2010.

Veterans Affairs Supportive Housing vouchers were slow to lease up, but increased staffing at the local VA office to increase issuance of referrals indicates that lease rates for these vouchers will increase significantly in the next plan year. As of the end of FY2010, 98 out of 105 (93%) VASH vouchers were leased up, and we expect that number to increase during FY2011. (The utilization rate of 61.1% above is averaged over the fiscal year; utilization rates were very low at the beginning of FY2010.)

**Number of Project-Based Vouchers committed/in use:** 1,098 vouchers in use  
142 additional vouchers committed

**Description of projects where new vouchers are placed:**

Project	Date Committed	PBVs Committed	Project Description
Sandy Apartments	April 2009	14	Housing for disabled households, with services provided by the nonprofit agency Luke Dorf.
Martha Washington	July 2009	45	Housing for homeless and disabled populations. Central City Concern will provide property management and social services for residents.
Rockwood Building	Nov 2009	15	New construction, managed by Human Solutions, with a preference for homeless families. Services provided by Human Solutions and 8 partner agencies.
PCRI Scattered	Nov 2009	7	Scattered site houses that serve larger households.
Greentree Court	Nov 2009	3	Approved 3 additional PBVs for an existing project owned by Human Solutions. Preference is provided for homeless families participating in Bridges to Housing program, as well as other households who are disabled or homeless.

### C. Waiting List Information

#### Households on the waiting lists at the end of FY2010

##### Public Housing

	Studio/ 1 BR		Bedroom Size				Total Households	Percent Households
	1,608	4	2BR	3BR	4BR	5+BR		
Elderly/Disabled Units	1,608	4	0	0	0	0	1,612	28%
Family Units	118	2,222	1,846	15	0	0	4,201	72%
<b>Total</b>	<b>1,726</b>	<b>2,226</b>	<b>1,846</b>	<b>15</b>	<b>0</b>	<b>0</b>	<b>5,813</b>	<b>100%</b>

##### Description of waiting lists and any changes made:

HAP currently manages public housing through site-based waiting lists in addition to a first available option for sites operated by HAP staff. Applicants have the option of choosing up to three individual properties (from those with open waiting lists) or selecting the first available option. New Columbia (which is managed by a private property management company) maintains a separate site-based waiting list. Similarly, HAP has activated previously banked public housing units by putting them into larger non-public housing developments; those sites will also manage their own waiting lists. These sites include Fairview Oaks, Rockwood Station, Martha Washington and the Jeffrey.

HAP opened a number of public housing waiting lists in FY2010. In October 2009, HAP opened waiting lists for elderly/disabled units at Hollywood East, NW Tower, Williams Plaza, Ruth Haefner Plaza, Schunk Riverview Tower and Medallion Apartments. This opening resulted in **1,231** new applicants.

Also in October 2009, HAP opened the waiting list for 1-, 2- and 3-bedroom units at New Columbia Apartments. This opening resulted in **453** new applicants.

In June 2009, HAP opened the waiting lists for 3-bedroom units at Hillsdale Terrace and Slavin Court. This opening resulted in **231** new applicants.



**Section 8 / Housing Choice Voucher (HCV)**

At the end of FY2010, there were **2,079** households on the HCV waiting list:

Family Type (members)	1	2	3	4	5	6	7+	Total
No. on wait list	882	495	340	186	104	33	39	<b>2,079</b>

**Description of waiting lists and any changes made:**

The HCV waiting list is a centralized list maintained by HAP, which is currently closed except for terminally ill applicants who provide documentation that they are expected to live for less than 12 months. The waiting list was last opened in November 2006, and HAP accepted 10,000 applications over three weeks. Applicants were randomly assigned numbers and the first 3,000 were placed on the waiting list. As HAP neared the end of the list in late 2008, letters were sent to the remaining 7,000 applicants who were given a chance to be put back on the waiting list. Approximately 3,000 people accepted this opportunity.

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During FY2010, **332** applicants were pulled from the waiting list. There are currently 2,079 people remaining on the waiting list. No changes were made to the waiting list procedures during FY2010.

**Description of other waiting lists:**

The project-based waiting lists are site-based and maintained by management at each of the properties where project-based vouchers are placed. Nearly half of the project-based vouchers are in buildings with waiting list preferences for elderly or disabled households. Many of the buildings that do not offer an elderly or disabled preference offer a preference for homeless households. HAP audits waiting list maintenance at each site to ensure that lists are maintained in accordance with project-based voucher regulations.

### III. Non-MTW Related Housing Authority Information (Optional)

#### Description of non-MTW activities implemented by the Agency

Over the past year, HAP implemented a non-smoking policy throughout the entire traditional public housing portfolio, and the majority of the affordable housing portfolio. The implementation process included resident meetings to inform residents of the new policy, to provide them an opportunity to comment and ask questions about the new policy, and to present resources for residents interested in quitting smoking or modifying their smoking behaviors. Public housing site managers and resident service coordinators were given additional training on how to support residents through the non-smoking transition. This included information about smoking cessation and lease enforcement procedures.

In the initial implementation process, there was a strong interest in installing free-standing, covered outdoor smoking areas prior to implementation dates to assist residents with the transition. However, since most of the intended sites (mainly elderly/disabled high-rise buildings) had additional building and neighborhood building requirements, this would have delayed installation to after the implementation date and created additional costs that were previously unaccounted for. Therefore HAP did not install these structures.

Overall, residents and staff have been pleased with the policy. Most residents have been compliant with the new policy and no residents have been formally evicted solely for violating the non-smoking policy.

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## V. Proposed MTW Activities: HUD approval requested

### FY2010-P1: SUBSIDY CHANGE TO PRESERVE PUBLIC HOUSING UNITS

#### A. List activities that were proposed in the Plan, approved by HUD, but not implemented:

In our FY2010 MTW Plan, HAP identified our intention to submit a request to HUD to change the funding for our public housing properties to project-based voucher subsidy.

#### B. Discuss why the activity was not implemented:

HAP decided to delay implementation of this activity in FY2010, as other large projects such as the administration of ARRA funds and the HOPE VI application required more immediate attention and effort.

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### FY2010-P6: FAMILY ELIGIBILITY FOR PROJECT-BASED VOUCHER ASSISTANCE

#### A. List activities proposed in the Plan, approved by HUD, but not yet implemented:

In order to provide greater access to low-income families with high barriers, screening and eligibility requirements at certain project-based voucher properties may differ from traditional criteria.

#### B. Discuss why the activity was not implemented:

HAP is currently working with Bridges to Housing to modify criteria at properties to provide greater access to certain families. However, an agreement was not reached in FY2010 and therefore, this activity was not implemented. HAP expects this activity to be implemented in FY2011 with the Bridges to Housing properties, as well as with the Resource Access Center and the Martha Washington.

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**VI. Ongoing MTW Activities: HUD approval previously granted**

**FY2010-P2: OPPORTUNITY HOUSING INITIATIVE AT NEW COLUMBIA**  
(Identified in Plan Year FY2010; Implemented FY2010)

**A. List activities continued from the prior Plan year(s)**

HAP has implemented a five-year family self-sufficiency program for families either living in public housing or receiving Section 8 at New Columbia.

**B. Provide detailed information on the impact of the activity, compared against the proposed benchmarks and metrics**

Impact	Metric	Baseline	Benchmark	Outcome
Increase enrollment	Households served	0 households served before activity began	50 households enrolled by FY2010	19 households enrolled as of FY2010 <ul style="list-style-type: none"> <li>See Part C for narrative about this benchmark</li> </ul>
Encourage participation in workshops	Individuals who complete one or more of the following workshops: Financial Literacy, Housing Mobility or Career Enhancement	0	25 in first year	12 individuals in FY2010 <ul style="list-style-type: none"> <li>See Part C for narrative about this benchmark</li> </ul>
Encourage education	Individuals who enroll in a vocational or post-secondary educational program	0	5 in first year	5 individuals in FY2010
Successfully graduate participants	Participants successfully graduated	0	75% / 38 participants after 5 years	0 participants have graduated, however, participants are on track to graduate after 5 years
Increase participant income	Average participant income for those with earnings	\$16,537 beginning average income for those enrolled in FY2010	5% annual increase <ul style="list-style-type: none"> <li>\$17,364 by FY2010</li> <li>\$18,232 by FY2011</li> <li>\$19,144 by FY2012</li> <li>\$20,101 by FY2013</li> <li>100% at graduation</li> <li>\$33,074 by FY2014</li> </ul>	\$20,068 in FY2010

Impact	Metric	Baseline	Benchmark	Outcome
Increase employment/work opportunity	Participants receiving employment or promotion	0	75% / 38 participants by 2014	16 participants in FY2010
Increase escrow accumulation	Average dollars in escrow	\$0 at entry	\$5,000 upon graduation (FY2014)	16 participants have begun earning escrow, with an average accumulation of \$1,021

**C. Provide a narrative explanation if benchmarks were not achieved or the activity was determined ineffective**

HAP did not meet the enrollment goal of 50 families in the OHI program at New Columbia by FY2010. OHI is a relatively new program at New Columbia and is optional. Families have been hesitant to make that commitment; however, the speed at which families are signing up has increased over the past few months, as a new staff person has started to develop relationships on site. Many families have been added to the program and HAP anticipates being at 50 families by July 2010.

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Because HAP did not have 50 families enrolled in the program, there were less than 25 participants in workshops in the first year. However, HAP did achieve greater than 50% participation in workshops for the 19 enrolled household, and anticipates meeting the benchmark of 25 workshop participants once enrollment reaches 50 households.

**D. Identify any new indicators if benchmarks or metrics have been revised**  
N/A

**E. Describe revisions if data collection methodology has changed**  
N/A

**F. If a different authorization was used, provide the new authorization and describe why the change was necessary**  
N/A

**G. Cite the specific provision(s) or regulation that authorized the Agency to make the change**  
N/A

**FY2010-P3: AGENCY-BASED RENT ASSISTANCE PROJECT WITH LOCAL NON-PROFITS**  
(Identified in Plan Year FY2010; Implemented FY2010)

**A. List activities continued from the prior Plan year(s)**

HAP has allocated a small pool of rent assistance funds to be administered by SE Works and NW Pilot Project – local non-profits serving distinct groups of participants.

**B. Provide detailed information on the impact of the activity, compared against the proposed benchmarks and metrics**

Impact	Metric	Baseline	Benchmark	Outcome
<b>SE Works</b>				
Maintain households served	Households served	0 households served before activity began	20 households in year 1	<ul style="list-style-type: none"> <li>• 14 households enrolled in year 1</li> <li>• 2 households exited before reaching self-sufficiency – 1 left by choice to move in with family; 1 was terminated after being sent to prison</li> </ul>
Maintain households retaining housing (revised metric)	Households retaining housing	0 households	<ul style="list-style-type: none"> <li>• 80% / 16 households throughout receipt of rent assistance</li> <li>• 75% / 15 households 6 months after assistance ends</li> </ul>	<ul style="list-style-type: none"> <li>• 86% have maintained housing throughout receipt of rent assistance</li> <li>• No households have reached 6 months after end of assistance</li> </ul>
Maintain high employment and participation in education/ training programs (revised metric)	Households employed or participating in education/ training programs	0 households	<ul style="list-style-type: none"> <li>• 75% / 15 households 6 months after assistance ends</li> <li>• 65% / 13 households 9 months after assistance ends</li> </ul>	<ul style="list-style-type: none"> <li>• No households have reached 6 months after end of assistance</li> <li>• No households have reached 9 months after end of assistance</li> </ul>
Maintain low re-offender rate	Participants who reoffend within one year of release date	0 participants	<ul style="list-style-type: none"> <li>• Less than 15% / 3 participants</li> </ul>	<ul style="list-style-type: none"> <li>• 1 participant (7% of those enrolled) reoffended</li> </ul>



Impact	Metric	Baseline	Benchmark	Outcome
NW Pilot Project				
Maintain households served	Households served	0 households	10 households in year 1	11 households enrolled (1 terminated and went to prison)
Maintain successful housing	Participants successfully housed after two years	0 participants	90% / 9 participants	10 of 11 (91%) participants have retained housing
Increase participants receiving disability income	Participants receiving disability income within two years	0 participants	70% / 7 participants	<ul style="list-style-type: none"> <li>6 participants (55%) have already received disability benefits within 5 months or less after enrollment.</li> <li>Participants continue to work toward receiving benefits within the two year timeframe.</li> </ul>

**C. Provide a narrative explanation if benchmarks were not achieved or the activity was determined ineffective**

HAP did not reach the benchmark of serving 20 households in the first year of the SE Works program. The contract with SE Works requests that 40 households are served over the course of three years, and HAP had anticipated there would be 20 households served in year 1. The reduced number in year 1 is due to several factors, including a longer-than-expected start up period while program guidelines were being finalized, and a desire by SE Works to ensure they had services in place for all households served. SE Works still expects to serve 40 households over the contract period.

**D. Identify any new indicators if benchmarks or metrics have been revised**

N/A

**E. Describe revisions if data collection methodology has changed**

N/A

**F. If a different authorization was used, provide the new authorization and describe why the change was necessary**

N/A

**G. Cite the specific provision(s) or regulation that authorized the Agency to make the change**

N/A

**FY2010-P4: MEASURES TO IMPROVE THE RATE OF VOUCHER HOLDERS WHO SUCCESSFULLY LEASE-UP**  
(Identified in Plan Year FY2010; Implemented FY2010)

**A. List activities continued from the prior Plan year(s)**

HAP has implemented a variety of measures to improve landlord acceptance of Section 8 vouchers in the local community.

**B. Provide detailed information on the impact of the activity, compared against the proposed benchmarks and metrics**

Impact	Metric	Baseline	Benchmark	Outcome
Improve voucher lease-up rate	Voucher lease-up rate	74% in FY2009	85% in FY2010	For households pulled from the waitlist in FY2010 who had their voucher issued for: <ul style="list-style-type: none"> <li>at least 60 days, the lease up rate is 77.5%.</li> <li>at least 120 days, the lease up rate is 89.3%.</li> </ul> <ul style="list-style-type: none"> <li>See Part C for narrative about this benchmark</li> </ul>
Maintain landlords who accept Section 8	Number of landlords who accept Section 8	3,166 in FY2009	3,166	2,704 in FY2010 <ul style="list-style-type: none"> <li>See Part C for narrative about this benchmark</li> <li>See Part D for narrative about this metric</li> </ul>
Increase number of new landlords who accept Section 8	Number of new landlords who accept Section 8	424	5% increase or 445 new landlords in FY2010	291 in FY2010 <ul style="list-style-type: none"> <li>See Part C for narrative about this benchmark</li> <li>See Part D for narrative about this metric</li> </ul>
Decrease lease-up time	Average number of days for a voucher holder to lease up	51	Less than 50	46.4 days

**C. Provide a narrative explanation if benchmarks were not achieved or the activity was determined ineffective**

HAP grants a large number of voucher extensions based on reasonable accommodation requests from disabled applicants. As a result, the lease-up rate is more representative when looking at households who have had their vouchers for 120 days (89.3% lease-up rate).

HAP did not reach the benchmark of maintaining 3,166 landlords who accepted Section 8. However, this number was impacted by work to remove duplicates in the accounting system. Historically, some landlords have had multiple account numbers. HAP is eliminating duplicate accounts, resulting in a decrease in the number of "active landlords."

HAP did not reach the benchmark of increasing new landlords who accept Section 8 to 445. With only four pulls from the waiting list during FY2010, there were few opportunities for new landlords to begin program participation.

**D. Identify any new indicators if benchmarks or metrics have been revised**

The number of active and new landlords who accept Section 8 is not an ideal metric for tracking the community's willingness to accept Section 8 vouchers, because it includes only landlords who currently have a Section 8 tenant. HAP hopes to include, in future reports, a metric that tracks the number of landlords in the community who indicate willingness to accept a Section 8 voucher. HAP is currently working with Metro Multifamily Housing Association to determine how this could be tracked.

In future reports, HAP will not include the metrics regarding "Number of new landlords who accept Section 8." Because there are a fixed number of vouchers, there are constraints on the number of new landlords who could join the program and any marked increase in the number of new landlords would necessarily suggest a decrease of "current" landlords.

**E. Describe revisions if data collection methodology has changed**

HAP is working with Metro Multifamily Housing Association to determine if we can create baselines, benchmarks, and data collection methodology to track the number of landlords in the community who indicate a willingness to accept a Section 8 voucher. Metro Multifamily Housing Association issues a regular survey to landlords that may be able to include questions that would indicate landlord attitudes around accepting a Section 8 voucher.

**F. If a different authorization was used, provide the new authorization and describe why the change was necessary**  
N/A

**G. Cite the specific provision(s) or regulation that authorized the Agency to make the change**  
N/A

**FY2010-P5: LIMITS FOR ZERO-SUBSIDY PARTICIPANTS**  
(Identified in Plan Year FY2010; Implemented FY2010)

**A. List activities continued from the prior Plan year(s)**

HAP has implemented limits for families that have a pattern of lowering their income after subsidy ends.

**B. Provide detailed information on the impact of the activity, compared against the proposed benchmarks and metrics**

Impact	Metric	Baseline	Benchmark	Outcome
Decrease in participants repeating pattern	Participants repeating pattern	10 zero-subsidy participants cycled back onto HAP in FY2009	10 participants or less	Number of zero-subsidy participants cycling back onto HAP in FY2010: 13

**C. Provide a narrative explanation if benchmarks were not achieved or the activity was determined ineffective**

Although the number of participants who cycled back to subsidy increased in this plan year, the numbers are too small to be significant. Furthermore, with the current state of the economy, it is not surprising that more households would gain income for a time, and then subsequently lose their jobs.

**D. Identify any new indicators if benchmarks or metrics have been revised**

N/A

**E. Describe revisions if data collection methodology has changed**

N/A

**F. If a different authorization was used, provide the new authorization and describe why the change was necessary**

N/A

**G. Cite the specific provision(s) or regulation that authorized the Agency to make the change**

N/A

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**FY2010-P7: RESOURCE ACCESS CENTER (RAC) DEVELOPMENT**  
 (Formerly FY2010-O1; Identified in Plan Years FY2008-FY2010; Implemented FY2010)

**A. List activities continued from the prior Plan year(s)**

HAP is serving as the master developer for this new facility to house the City of Portland and Multnomah County's primary day access center for people experiencing homelessness, a 90-bed men's shelter and approximately 130 units of affordable housing for people with very low incomes.

**B. Provide detailed information on the impact of the activity, compared against the proposed benchmarks and metrics**

<b>Impact</b>	<b>Metric</b>	<b>Baseline</b>	<b>Benchmark</b>	<b>Outcome</b>
Increase public housing units	Public housing units at RAC	0 units attributable to the RAC before the activity began	30 additional PH units attributable to the RAC by end of FY2012	Status as of March 31, 2010: Financial closing and start of construction during October 2009; construction on schedule.
Increase project-based voucher (PBV) units	PBV units at RAC	0 PBV units attributable to the RAC before the activity began	100 PBV units allocated at the RAC by FY2012	Status as of March 31, 2010: Financial closing and start of construction during October 2009; construction on schedule.

**C. Provide a narrative explanation if benchmarks were not achieved or the activity was determined ineffective**  
 N/A

**D. Identify any new indicators if benchmarks or metrics have been revised**

Since HAP does not require MTW authority to use the Construction Manager General Contractor (CM/GC) form of construction contracting, benchmarks measuring construction contingency amounts spent on unforeseen conditions and target business participation have been removed.

**E. Describe revisions if data collection methodology has changed**

Real Estate Operations and Rent Assistance staff will report on the number of public housing and project-based voucher units online in FY2012. The Development and Community Revitalization department will continue to track CM/GC expenses and target business participation, but these are not MTW activities and will not be included in HAP's MTW reporting.

**F. If a different authorization was used, provide the new authorization and describe why the change was necessary**  
N/A

**G. Cite the specific provision(s) or regulation that authorized the Agency to make the change**  
N/A

**FY2010-O2: POTENTIAL REDEVELOPMENT OF HILLSDALE TERRACE**

**A. List activities that were proposed in the Plan, approved by HUD, but not implemented:**

In our FY2010 MTW Plan, HAP discussed preparing an analysis for presentation to HAP’s Board of Commissioners recommending how best to redevelop Hillsdale Terrace, a physically distressed and socially isolated 60-unit public housing development.

**B. Discuss why the activity was not implemented:**

In the review process of HAP’s FY2011 Plan, it was determined that the CM/GC authority in Attachment D of HAP’s MTW agreement does not provide any regulatory relief related to this activity, which was the only MTW authorization referenced in this activity.

**FY2010-O3: REDEVELOPMENT OF SEARS MILITARY BASE**

**A. List activities that were proposed in the Plan, approved by HUD, but not implemented:**

In our FY2010 MTW Plan, HAP wrote that another non-profit community development corporation was chosen to serve as the master developer of affordable housing at this site.

**B. Discuss why the activity was not implemented:**

HAP identified this activity as discontinued, and the activity will be dropped from MTW reporting.



**FY2010-O4: ADDITION OF PUBLIC HOUSING OPERATING SUBSIDY AT AFFORDABLE HOUSING SITES**  
(Identified in Plan Years FY2007-FY2010; Implemented FY2010)

**A. List activities continued from the prior Plan year(s)**

Utilizing public housing operating subsidy at HAP's affordable properties allows for one-to-one replacement of public housing subsidy lost due to the sale of scattered sites and may allow for additional units to be brought back from the formerly "banked units". In FY2010, HAP began offering public housing subsidy for 25 households (two bedroom units) at Rockwood Station, a 195-unit property in Gresham.

**B. Provide detailed information on the impact of the activity, compared against the proposed benchmarks and metrics**

Impact	Metric	Baseline	Benchmark	Outcome
Increase subsidized housing units available at Rockwood Station	Subsidized housing units available at Rockwood Station	0 subsidized units available at Rockwood Station before FY2010	25 subsidized units added at Rockwood Station in FY2010	25 previously "banked" two-bedroom subsidies were turned on in December 2009-March 2010

**C. Provide a narrative explanation if benchmarks were not achieved or the activity was determined ineffective**  
N/A

**D. Identify any new indicators if benchmarks or metrics have been revised**  
HAP's FY2011 MTW Plan (approval pending) proposes a rent reform activity related to the 25 units at Rockwood Station. If approved, these will be added to next year's FY2011 MTW Report. If not approved, this activity will be removed from HAP's MTW reporting, as it has been clarified that no MTW authority is otherwise necessary to add the banked units to an affordable property.

**E. Describe revisions if data collection methodology has changed**  
N/A

**F. If a different authorization was used, provide the new authorization and describe why the change was necessary**  
N/A

**G. Cite the specific provision(s) or regulation that authorized the Agency to make the change**  
N/A

**FY2010-O5: NEW AFFORDABLE HOUSING**  
(Identified in Plan Years FY2007-FY2010; Implemented FY2009-FY2010)

**A. List activities continued from the prior Plan year(s)**

HAP is utilizing MTW authority to exceed the traditional limit of a 25% cap on the number of project-based voucher (PBV) units in a single building. At The Jeffrey and the Martha Washington, this flexibility allows HAP to take on these projects and make the operating budgets for these two developments work.

**B. Provide detailed information on the impact of the activity, compared against the proposed benchmarks and metrics**

Impact	Metric	Baseline	Benchmark	Outcome
<b>The Jeffrey</b>				
Increase subsidized housing units available	Subsidized housing units available	30 PBV units online 0 public housing units	Add 20 public housing units in FY2012	Financial closing completed in February 2010; HAP is planning to turn on subsidy for all 20 units before FY2012.
<b>Martha Washington</b>				
Increase subsidized housing units available	Subsidized housing units available	0 public housing units 0 PBV units (vacant building)	25 public housing units online in FY2011 45 PBV units online in FY2011	Financial closing and construction began August 2009. Public housing units are scheduled to come online in June-July 2010.

**C. Provide a narrative explanation if benchmarks were not achieved or the activity was determined ineffective**  
N/A

**D. Identify any new indicators if benchmarks or metrics have been revised**

Since HAP does not require MTW authority to use the Construction Manager General Contractor (CM/GC) form of construction contracting, benchmarks measuring construction contingency amounts spent on unforeseen conditions and target business participation have been removed.

**E. Describe revisions if data collection methodology has changed**

Real Estate Operations and Rent Assistance staff will report on the number of public housing and project-based voucher units brought online. The Development and Community Revitalization department will continue to track CM/GC expenses and target business participation at the Martha Washington, but these are not MTW activities and will not be included in HAP's MTW reporting.

**F. If a different authorization was used, provide the new authorization and describe why the change was necessary**  
N/A

**G. Cite the specific provision(s) or regulation that authorized the Agency to make the change**  
N/A

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**FY2010-O6: REDEVELOPMENT OF UNIVERSITY PLACE**

**A. List activities that were proposed in the Plan, approved by HUD, but not implemented:**

In our FY2009 MTW Plan, HAP described the redevelopment of University Place, which provides housing via 48 Single Room Occupancy units for very low-income residents.

**B. Discuss why the activity was not implemented:**

HAP has identified that no MTW authority is needed in this activity and has dropped it from our MTW reporting.

**FY2010-O7: OPPORTUNITY HOUSING INITIATIVE (OHI)**  
(Identified in Plan Year FY2008; Implemented FY2008-FY2009)

**A. List activities continued from the prior Plan year(s)**

HAP operates OHI self-sufficiency programs site-based at Fairview Oaks and Humboldt Gardens, and through a collaborative program with the Oregon Department of Human Services (DHS).

**B. Provide detailed information on the impact of the activity, compared against the proposed benchmarks and metrics**

Impact	Metric	Baseline	Benchmark	Outcome
<b>Fairview</b>				
Maintain enrollment	Households served	40	40	40 households in FY2010
Successfully graduate participants	Participants successfully graduated	0	75% / 30 participants after 5 years	0 participants have graduated, however, participants are on track to graduate after 5 years
Increase participant income	Average participant earned income for those with earnings	\$11,414 average income at program entry	5% annual increase <ul style="list-style-type: none"> <li>• \$11,985 by FY2010</li> <li>• \$12,584 by FY2011</li> <li>• \$13,213 by FY2012</li> <li>• \$13,874 by FY2013</li> <li>100% at graduation</li> <li>• \$22,828 by FY2014</li> </ul>	\$23,427 in FY2010
Increase employment/work opportunity	Participants receiving employment or promotion	0	75% / 30 participants by FY2014	27 participants
Increase escrow accumulation	Average dollars in escrow	\$0 at entry	\$5000 upon graduation (FY2014)	29 participants have begun earning escrow with an average accumulation of \$2,610

Impact	Metric	Baseline	Benchmark	Outcome
<b>Humboldt Gardens</b>				
Maintain enrollment	Households served	57	57	59 households in FY2010
Successfully graduate participants	Participants successfully graduated	0	75% / 43 participants after 5 years	1 participant graduated early. Other participants are on track to graduate after 5 years
Increase participant income	Average participant earned income for those with earnings	\$6,756 average income at program entry	5% annual increase <ul style="list-style-type: none"> <li>• \$7,094 by FY2010</li> <li>• \$7,449 by FY2011</li> <li>• \$7,821 by FY2012</li> <li>• \$8,212 by FY2013</li> </ul> 100% at graduation <ul style="list-style-type: none"> <li>• \$13,512 by FY2014</li> </ul>	\$14,062 in FY2010
Increase employment/work opportunity	Participants receiving employment or promotion	0	75% / 43 participants in FY2014	36 participants in FY2010
Increase escrow accumulation	Average dollars in escrow	\$0 at entry	\$5000 upon graduation (FY2014)	28 participants have begun earning escrow with an average accumulation of \$1,313

**FY2010-07: OPPORTUNITY HOUSING INITIATIVE (OHI)**  
(Continued)

Impact	Metric	Baseline	Benchmark	Outcome
<b>DHS Voucher Program</b>				
Maintain enrollment	Households served	21	21	21 households were initially enrolled in the program, and 18 are still active. • See Part D for narrative about this metric
Successfully graduate participants	Participants successfully graduated	0	75% / 16 participants after 5 years	No participants have graduated yet, although one participant left voluntarily and was working full time at \$16.83/hour.
Increase participant income	Average participant earned income for those with earnings	\$8,613	5% annual increase: • \$9,044 by FY2010 • \$9,496 by FY2011 • \$9,971 by FY2012 • \$10,469 by FY2013  Double by graduation: • \$17,226 by FY2014	\$14,479 in FY2010  • See Part D for narrative about this metric
Increase employment/work opportunity	Participants receiving new employment or promotion	0	75% / 16 participants by FY2014	To date, 11 out of 21 (52%) participants have gained new employment. Two of those participants were subsequently laid off.
Increase escrow accumulation	Average dollars in participants' escrow	\$0	\$5000 upon graduation (FY2014)	8 participants have begun earning escrow, with an average accumulation of \$972

**C. Provide a narrative explanation if benchmarks were not achieved or the activity was determined ineffective**  
N/A

**D. Identify any new indicators if benchmarks or metrics have been revised**

Going forward, the benchmark for maintaining enrollment in the DHS Voucher program will be 18 households. Due to funding limitations, HAP and DHS have agreed not to enroll additional families.

The baseline for DHS Voucher program participants' average earned income at the time of enrollment was calculated incorrectly in the FY2010 plan as \$6,529. The correct baseline average earned income was \$8,613.

**E. Describe revisions if data collection methodology has changed**  
N/A

**F. If a different authorization was used, provide the new authorization and describe why the change was necessary**  
N/A

**G. Cite the specific provision(s) or regulation that authorized the Agency to make the change**  
N/A

**FY2010-O8: BIENNIAL REVIEWS – RENT REFORM ACTIVITY**  
(Identified in Plan Years FY2008-FY2009; Implemented FY2008)

**A. List activities continued from the prior Plan year(s)**

HAP has implemented a biennial review schedule for all MTW voucher holders in Section 8, and for elderly/disabled residents in public housing.

**B. Provide detailed information on the impact of the activity, compared against the proposed benchmarks and metrics**

Impact	Metric	Baseline	Benchmark	Outcome
Annual staff time savings for Section 8 qualifying participants	Qualifying participants	7,475, which equates to 3,737 hours saved	7,000, which equates to 3,500 hours saved	7,407 qualifying participants in FY2010, which equates to a total of 3,703 hours saved
Annual staff time savings for qualifying public housing households	Qualifying households	1,092, which equates to 548 hours saved	1,000, which equates to 500 hours saved	1,123 qualifying households in FY2010, which equates to a total of 561 hours saved

**C. Provide a narrative explanation if benchmarks were not achieved or the activity was determined ineffective**  
N/A

**D. Identify any new indicators if benchmarks or metrics have been revised**  
N/A

**E. Describe revisions if data collection methodology has changed**  
N/A

**F. If a different authorization was used, provide the new authorization and describe why the change was necessary**  
N/A

**G. Cite the specific provision(s) or regulation that authorized the Agency to make the change**  
N/A



**FY2010-09: BIENNIAL INSPECTIONS**  
(Identified in Plan Years FY2008-FY2009; Implemented FY2008)

**A. List activities continued from the prior Plan year(s)**

HAP conducts biennial inspections for qualifying Section 8 households.

**B. Provide detailed information on the impact of the activity, compared against the proposed benchmarks and metrics**

Impact	Metric	Baseline	Benchmark	Outcome
Annual cost savings for Section 8 qualifying participants	Qualifying participants	1,527 qualifying participants, resulting in cost savings of approximately \$76,350	2-5% annual increase • 1,558 qualifying participants in FY2010, resulting in cost savings of approximately \$77,900	2,107 qualifying households in FY2010, resulting in a cost savings of approximately \$105,350.

**C. Provide a narrative explanation if benchmarks were not achieved or the activity was determined ineffective**

N/A

**D. Identify any new indicators if benchmarks or metrics have been revised**

N/A

**E. Describe revisions if data collection methodology has changed**

N/A

**F. If a different authorization was used, provide the new authorization and describe why the change was necessary**

N/A

**G. Cite the specific provision(s) or regulation that authorized the Agency to make the change**

N/A

**FY2010-O10: SIMPLIFIED ADMINISTRATIVE PROCEDURES – RENT REFORM ACTIVITY**  
(Identified in Plan Years FY2008-FY2009; Implemented FY2008)

**A. List activities continued from the prior Plan year(s)**

HAP has implemented several measures to relieve administrative burden and reduce intrusiveness with residents and participants:

- Disregard income related to assets valued at less than \$25,000
- Eliminate interim reviews for income increases (except in cases with an increase from zero income)
- Streamline Earned Income Disallowance (EID) for qualifying clients
- Eliminate EID for new GOALS participants

**B. Provide detailed information on the impact of the activity, compared against the proposed benchmarks and metrics**

Impact	Metric	Baseline	Benchmark	Outcome
<b>Disregarding assets &lt;\$25,000</b>				
Decrease annual staff time spent tracking assets	Hours spent on assets tracked	2,905 hours spent tracking 5,811 assets (approx. 30 minutes per asset) in FY2007	581 hours or less spent tracking 1,162 assets	193.5 hours spent tracking 387 assets in FY2010
<b>Eliminating Interim Reviews</b>				
Decrease annual staff time spent on interim reviews	Hours spent on interim reviews	10,317 hours spent on 10,317 interim reviews (est. 1 hour per review)	10,000 hours or less spent on interim reviews	6,476 hours spent on interim reviews in FY2010
<b>Changes to EID</b>				
Decrease annual staff time spent on EID reviews	Hours spent on second interim EID reviews	90 hours spent on 180 second interim EID reviews	0 hours spent on second interim EID reviews	70 households who qualified for the EID in FY2010 0 hours spent on second interim EID reviews (resulting in savings of 35 hours)

- C. Provide a narrative explanation if benchmarks were not achieved or the activity was determined ineffective  
N/A
- D. Identify any new indicators if benchmarks or metrics have been revised  
N/A
- E. Describe revisions if data collection methodology has changed  
N/A
- F. If a different authorization was used, provide the new authorization and describe why the change was necessary  
N/A
- G. Cite the specific provision(s) or regulation that authorized the Agency to make the change  
N/A

## VII. Sources and Uses of Funding

Due to the timing of HAP's fiscal year end audit, actual activity presented below is preliminary and unaudited.

### A. Sources & Uses of MTW Funds

Sources of Funds	Actual	Budget as Adopted	Preliminary Plan*
Rental Revenue	4,409,490	4,536,383	4,874,163
Section 8 Subsidy	59,398,423	57,635,100	58,740,624
Operating Subsidy	9,427,987	9,017,481	8,443,195
HUD Grants	1,383,778	1,261,692	976,162
Other Revenue	658,377	716,016	631,273
HUD NonOperating Contributions	4,013,848	3,503,147	3,550,762
<b>Total Sources</b>	<b>79,291,903</b>	<b>76,669,819</b>	<b>77,216,180</b>

\*As submitted in MTW Plan (prepared January 2009); final budget adopted March 2009.

Uses of Funds	Actual	Budget as Adopted	Preliminary Plan*
PH Subsidy Transfer	1,353,830	1,241,166	951,123
Housing Assistance Payments	53,042,685	53,129,760	52,324,373
Administration	7,522,715	7,308,898	7,007,914
Tenant Services	310,693	243,064	65,961
Maintenance	5,782,832	5,756,788	6,202,119
Utilities	2,104,442	2,355,212	2,058,535
General	441,325	390,492	407,331
Central Office Cost Allocations	3,070,842	3,077,042	2,398,695
HUD Capital Expenditures	4,013,848	3,503,147	3,550,762
<b>Total Uses</b>	<b>77,643,212**</b>	<b>77,005,569</b>	<b>74,966,813</b>

\*As submitted in MTW Plan (prepared January 2009); final budget adopted March 2009.

\*\*Excess funds reflected in Sources are held in reserve pending use by approved MTW initiatives.

(Note: ARRA funds are not included on the MTW Sources and Uses Statement)

**B. Sources & Uses of State and Local Funds**

Sources of Funds	Actual	Budget as Adopted	Preliminary Plan *
State, Local & Other Grants	1,427,696	1,710,154	1,803,654
Non-Operating Capital Contributions	10,562,681**	-	-
<b>Total Sources</b>	<b>11,990,377</b>	<b>1,710,154</b>	<b>1,803,654</b>

\*As submitted in MTW Plan Amendment (prepared June 2009); final budget adopted March 2009.

\*\* \$4,750,000 was received from Multnomah County in FY2010 for the Martha Washington Project.

The funds are being held in reserve pending use for future Martha Washington costs.

Uses of Funds	Actual	Budget as Adopted	Preliminary Plan *
Housing Assistance Payments (STRA)	1,165,635	1,482,426	1,405,802
Administration	168,847	217,040	316,427
Tenant Services	65,866	10,500	10,500
Maintenance	7,665	-	-
Utilities	-	-	-
General	126	-	-
Other Personnel Expense	-	-	11,394
PH Subsidy Transfer	-	-	-
Central Office Cost Allocations	9,057	188	59,530
Capital Expenditures	5,812,681	-	-
<b>Total Uses</b>	<b>7,229,877</b>	<b>1,710,154</b>	<b>1,803,654</b>

\*As submitted in MTW Plan Amendment (prepared June 2009); final budget adopted March 2009.

**C. Sources & Uses of COCC (If Applicable):**

Not applicable. HAP uses a cost allocation system.

#### **D. Allocation Method for Central Office Costs**

The Housing Authority of Portland has elected to use an allocation method for central office costs. We have a variety of administrative departments and have developed a method to allocate these departments based on the key drivers of expense. This methodology meets the requirements of OMB A-87.

The allocation method is as follows:

1. Level 1:
  - a. The cost of the administrative office building is allocated to the departments based on space occupied
2. Level 2:
  - a. The executive department is allocated equally to each of the operating groups
  - b. Human Resources, Purchasing and IT are allocated to the operating groups based on FTEs within the operating groups
  - c. Accounting and Finance is allocated to the operating groups based on a combination of operating expenses and fixed assets
3. Level 3:
  - a. Public Housing Administration as well as the central office allocations to public housing are then allocated to the properties based on units
  - b. Rent Assistance Administration (Housing Choice Vouchers and other Rent Assistance Programs) as well as the central office allocations to Rent Assistance are then allocated to the departments within this operating group based on vouchers
  - c. Resident Services Administration as well as the central office allocations to Resident Services are then allocated to the departments within this operating group based on operating expenses

Allocated overhead is reported separately from direct operating costs in the operating group financial reports. The allocations result in a net zero Net Operating Income/Loss for the administrative departments.

#### **E. Uses of Single-Fund Flexibility**

HAP currently uses fungibility within the Section 8 funding stream for activities such as agency-based assistance and measures to increase landlord participation, such as a landlord guarantee fund. HAP does not currently blend public housing and Section 8 funds.

## **VIII. Administrative**

### **A. Correction of Observed Deficiencies**

HUD did not visit HAP for an MTW review during FY2010.

The Rent Assistance Department had a HUD VMS Data Integrity Review in August 2009. The department had an outstanding audit with no findings.

Public Housing had full REAC inspections across the portfolio in 2009. On a 30-point scoring basis, the average inspection score was 25.4, which is considered passing.

### **B. Agency-Directed Evaluations, as applicable: N/A**

### **C. Performance and Evaluation Report for Capital Fund activities not included in the MTW Block Grant**

See Appendix

### **D. Certifications**

See attached Board Resolution

# Appendix

## Annual Statement/Performance and Evaluation Report Capital Fund Program, Capital Fund Program Replacement Housing Factor and Capital Fund Financing Program

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing  
OMB No. 2577-0226  
Expires 4/30/2011

Part I: Summary		FFY of Grant: 2009 FFY of Grant Approval:	
PHA Name: Housing Authority of Portland		Grant Type and Number Capital Fund Program Grant No: OR-16S00250109 Replacement Housing Factor Grant No: Date of CFFP:	
Type of Grant <input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Performance and Evaluation Report for Period Ending: Summary by Development Account		<input checked="" type="checkbox"/> Revised Annual Statement (revision no:1 ) <input type="checkbox"/> Final Performance and Evaluation Report	
Line	Original	Revised <sup>2</sup>	Total Actual Cost <sup>1</sup> Expended
1	Total non-CFP Funds		
2	1406 Operations (may not exceed 20% of line 21) <sup>3</sup>		
3	1408 Management Improvements		
4	1410 Administration (may not exceed 10% of line 21)	-0-	230,000
5	1411 Audit		
6	1415 Liquidated Damages		
7	1430 Fees and Costs	758,188	387,523
8	1440 Site Acquisition		
9	1450 Site Improvement	-0-	614,750
10	1460 Dwelling Structures	5,243,419	4,812,491
11	1465.1 Dwelling Equipment—Nonexpendable	-0-	69,917
12	1470 Non-dwelling Structures		
13	1475 Non-dwelling Equipment		
14	1485 Demolition		
15	1492 Moving to Work Demonstration		
16	1495.1 Relocation Costs	266,132	153,058
17	1499 Development Activities <sup>4</sup>		

<sup>1</sup> To be completed for the Performance and Evaluation Report.

<sup>2</sup> To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

<sup>3</sup> PHAs with under 250 units in management may use 100% of CFP Grants for operations.

<sup>4</sup> RHF funds shall be included here.



Annual Statement/Performance and Evaluation Report  
Capital Fund Program, Capital Fund Program Replacement Housing Factor and  
Capital Fund Financing Program

<b>Part I: Summary</b>		FFY of Grant: 2009	
PHA Name: Housing Authority of Portland		FFY of Grant Approval:	
Grant Type and Number Capital Fund Program Grant No: OR- 16S00250109 Replacement Housing Factor Grant No: Date of CFFP:			
Type of Grant <input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Performance and Evaluation Report for Period Ending:		<input checked="" type="checkbox"/> Revised Annual Statement (revision no: 1 )	
<input type="checkbox"/> Reserve for Disasters/Emergencies		<input type="checkbox"/> Final Performance and Evaluation Report	
Line	Summary by Development Account	Total Estimated Cost	Total Actual Cost <sup>1</sup>
		Original	Obligated
18a	1501 Collateralization or Debt Service paid by the PHA		
18ba	9000 Collateralization or Debt Service paid Via System of Direct Payment		
19	1502 Contingency (may not exceed 8% of line 20)		
20	Amount of Annual Grant:: (sum of lines 2 - 19)	6,267,739	
21	Amount of line 20 Related to LBP Activities		
22	Amount of line 20 Related to Section 504 Activities		
23	Amount of line 20 Related to Security - Soft Costs		
24	Amount of line 20 Related to Security - Hard Costs		
25	Amount of line 20 Related to Energy Conservation Measures		
<b>Signature of Executive Director</b>		<b>Signature of Public Housing Director</b>	
		Date	Date
		2-23-10	

<sup>1</sup> To be completed for the Performance and Evaluation Report.  
<sup>2</sup> To be completed for the Performance and Evaluation Report or a Revised Annual Statement.  
<sup>3</sup> PHAs with under 250 units in management may use 100% of CFP Grants for operations.  
<sup>4</sup> RHF funds shall be included here.

Part II: Supporting Pages		Federal FFY of Grant: 2009						
PHA Name: Housing Authority of Portland		Grant Type and Number Capital Fund Program Grant No: OR-16S00250109 CFFP (Yes/No): Replacement Housing Factor Grant No:						
Development Number/PHA-Wide Activities	General Description of Major Work Categories	Development Account No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised <sup>1</sup>	Funds Obligated <sup>2</sup>	Funds Expended <sup>2</sup>	
Capital Fund Project wide Admin	Relocation Staff direct coding for projects Development Finance Construction Accounting Stimulus Coordinator Salary and Benefits for above positions	1410		-0-	230,000			
OR 2-21	Fir Acres A&E services - Design, Drawings Site Improvements - New wrought iron fencing, playground Comprehensive modernization kitchen and bathroom Appliances Window Treatments	1430 1450	28	42,284 -0-	42,291 148,780			Listed in 5yr plan. Included in MTW amended plan for FY 2010
	Tenant relocation cost for modernization	1460		324,653	1,171,185			
OR 2-21	Subtotal			381,779	1,384,040			Listed in 5yr plan. Included in MTW amended plan for FY 2010
OR 2-22	Townhouse Terrace A&E service Design, Drawings Site Imp - new irrigation system Comprehensive modernization kitchen and bath Appliances Window Treatments	1430 1450	30	195,852 319,510	57,626 145,677 982,839			Listed in 5yr plan. Included in MTW amended plan for FY 2010
OR 2-22	Tenant relocation cost for modernization Subtotal	1465.1 1465.1 1495.1		-0- -0- 41,025	2,336 16,497 246			
	Subtotal			556,387	1,205,221			

form HUD-50075.1 (4/2008)

Part II: Supporting Pages		Grant Type and Number		Federal FFY of Grant: 2009			
PHA Name: Housing Authority of Portland		Capital Fund Program Grant No: OR-16S00250109					
Development Number Name/PHA-Wide Activities		CFPP (Yes/No): Replacement Housing Factor Grant No:					
Development Number Name/PHA-Wide Activities	General Description of Major Work Categories	Development Account No.	Quantity	Total Estimated Cost	Total Actual Cost	Status of Work	
				Original	Revised <sup>1</sup>	Funds Obligated <sup>2</sup>	Funds Expended <sup>2</sup>
OR 2-23	Stark Manor A&E Services - Design, Drawings Site Improv - Demolition, new trash enclosures	1430 1450	30	49,647 -0-	57,138 215,194		
	Comprehensive modern Kitchn & Bath	1460		381,186	981,683		Listed in 5yr plan. Included in MTW amended plan for FY 2010
	Appliances - Ranges	1465.1		-0-	12,000		
	Window Treatments	1465.1		17,427	8,897		
	Tenant relocation costs for modernization	1495.1			1,755		
	Subtotal			448,260	1,276,667		
OR 2-32	Camelia, Bel Park, Demar Downs A&E Services - Design, Drawings Site work - Overlay parking lots, new striping	1430 1450	42	104,498 -0-	71,427 92,122		
	Site work - landscaping replacing diseased trees with new trees	1450		-0-	7,110		Listed in 5yr plan. Included in MTW amended plan for FY 2010
	Comprehensive modernization Kitchen and Bath	1460		1,350,362	1,216,745		
	Appliances - ranges	1465.1		-0-	2,208		
	Window Treatments	1465.1		-0-	7,755		
	Tenant relocation costs for modernization	1495.1		39,920	59,822		
	Subtotal			1,494,780	1,457,189		
OR 2-32							

form HUD-50075.1 (4/2008)

Annual Statement/Performance and Evaluation Report  
 Capital Fund Program, Capital Fund Program Replacement Housing Factor and  
 Capital Fund Financing Program

U.S. Department of Housing and Urban Development  
 Office of Public and Indian Housing  
 OMB No. 2577-0226  
 Expires 4/30/2011

Part II: Supporting Pages		Grant Type and Number Capital Fund Program Grant No: OR - 16S00250109 CFPP (Yes/No): Replacement Housing Factor Grant No:		Federal FFY of Grant: 2009				
Development Number Name/PHA-Wide Activities	General Description of Major Work Categories	Development Account No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised <sup>1</sup>	Funds Obligated <sup>2</sup>	Funds Expended <sup>2</sup>	
OR 2-36	Winchell, Cora Park, Chateau A&E Services - Design, Drawings Site work - New fencing and landscaping Window Treatments Comprehensive interior modernization including kitchen, bath, replaced carpet in each unit, replace doors and hardware, painting, etc.	1430 1450 1465.1 1460	30	121,562	31,644			Listed in 5yr plan. Included in MTW amended plan for FY 2010
OR 2-36	Tenant relocation costs for modernization	1495.1		67,150	44,798			
OR 3-37	Subtotal Alderwood, Powellhurst, Gallagher A&E Services - Design, Drawings Comprehensive interior modernization including kitchen, bath, resilient flooring, painting, new insulation, etc Tenant relocation costs for modernization	1430 1460	139	1,180,372	285,634			Listed in 5yr plan. Included in MTW amended plan for FY 2010
OR 3-37	Subtotal	1495.1		73,169	41,238			
OR 2-51	Tillicum North, Tillicum South A&E Services - Design, Drawings Comprehensive exterior renovation includes replacing window sills, replace wood siding. Tenant relocation costs for modernization	1430 1460	30	1,882,099	111,656			Listed in 5yr plan. Included in MTW amended plan for FY 2010
OR 2-51	Subtotal	1495.1		7,428	-0-			
				191,060	23,921			

<sup>1</sup> To be completed for the Performance and Evaluation Report or a Revised Annual Statement.

<sup>2</sup> To be completed for the Performance and Evaluation Report.

Part II: Supporting Pages		Federal FFY of Grant: 2009						
PHA Name: Housing Authority of Portland		Grant Type and Number Capital Fund Program Grant No: OR-16S00250109 CFPP (Yes/No): Replacement Housing Factor Grant No:						
Development Number Name/PHA-Wide Activities	General Description of Major Work Categories	Development Account No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised <sup>1</sup>	Funds Obligated <sup>2</sup>	Funds Expended <sup>2</sup>	
OR 2-52	Hunter's Run, Harold Lee A&E Services - Design, Drawings Comprehensive exterior renovation includes replacing window sills, replace wood siding.	1430 1460	20	14,731 113,100	23,536 -			Listed in 5yr plan. Included in MTW amended plan for FY 2010
OR 2-52	Tenant relocation cost for modernization	1495.1		5,171	-0-			
OR 2-42	Subtotal Celilo Court A&E Services - Design, Drawings Comprehensive interior renovation includes replace underlayment and floor tile, replace kitchen and laundry cabinets and countertops, etc	1430 1460		133,002 -0- -0-	23,536 9,522 260,352			Listed in 5yr plan. Included in MTW amended plan for FY 2010
OR 2-42	Subtotal			-0-	269,874			
Grand Total				-0-	230,000			
1410				758,188	387,523			
1430				-0-	614,750			
1450				5,243,419	4,812,491			
1460				-0-	69,917			
1465.1				266,132	153,058			
1495.1								

<sup>1</sup> To be completed for the Performance and Evaluation Report or a Revised Annual Statement.



M E M O R A N D U M



DATE: June 15, 2010

TO: Board of Commissioners

FROM: Michael Buonocore, Assistant Director, Policy and Planning

SUBJECT: Resolution 10-06-02 authorizes the Housing Authority of Portland (HAP) to submit the MTW Eleventh-Year Annual Report, with certifications, to the Department of Housing and Urban Development (HUD)

The Board of Commissioners is requested to authorize HAP to submit the MTW Eleventh-Year Annual Report, with certifications, to the Department of Housing and Urban Development (HUD). This year's report corresponds to HAP's fiscal year 2010.

Background

As a housing authority with the MTW designation, HAP is obligated to submit an annual report detailing its progress toward objectives proposed in its prior year's annual MTW plan. This year's report follows the format prescribed in HAP's new 10-year agreement with HUD, which requires certifications to ensure the agency serves primarily the same population of people as it would absent the MTW flexibility. These are incorporated in the resolution.

Conclusion/Recommendation

Staff recommends approval of the attached resolution.



## RESOLUTION 10-06-02

RESOLUTION 10-06-02 AUTHORIZES THE HOUSING AUTHORITY OF PORTLAND (HAP) STAFF TO SUBMIT THE MOVING TO WORK (MTW) ELEVENTH YEAR ANNUAL REPORT, WITH CERTIFICATIONS, TO THE DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT (HUD)

WHEREAS, HAP is obligated by its MTW agreement with HUD to submit an annual report detailing its progress toward objectives proposed in its prior year's annual MTW plan; and

WHEREAS, as part of its MTW reporting obligation, HAP certifies that more than 75% of families assisted by the Agency are very low-income families; that it continues to assist substantially the same total number of eligible low-income families as would have been served without MTW; and that it maintains a comparable mix of families as would have been served had the agency not participated in the MTW demonstration.

NOW, THEREFORE, BE IT RESOLVED, by the Board of Commissioners of the Housing Authority of Portland that staff is directed to submit this approved Moving to Work Eleventh Year Annual Report to the Department of Housing and Urban Development.

**Adopted: June 15, 2010**

**HOUSING AUTHORITY OF PORTLAND**

Lee E. Moore, Sr., Chair

**Attest:**

Steven D. Rudman, Secretary

## **Housing Services**

Pursuant to Priority Two of the Consolidated Plan, PHB provided housing services focused on assisting low-income people in obtaining and retaining appropriate, affordable housing. Housing services supported with federal resources during FY 2010-2011 include:

### **Housing Connections**

Housing Connections is a web-based housing information system that assists renters and agency staff to find available, affordable housing and housing services. The Housing Locator, the system component that allows users to search for a variety of available, affordable, and accessible housing with user-friendly search tools, was implemented in May 2002. In FY 2010--11 PHB continued to contract out the day-to-day operations of Housing Connections to 211*info*. This scope of work included outreach to renters and agencies, phone support to all users, and data quality review of listings. In FY 2010-11 PHB continued to include City general fund in its contract with 211*info* to support the 211 information and referral service in Portland, because access to a wide array of social services supports housing stability. PHB also continued to contract out the outreach to landlords to the Fair Housing Council of Oregon with a continued focus on expanding the inventory of units listed in Housing Connections. See outcomes in the Fair Housing Outcome Table below. PHB continued work to improve how accessible housing features are listed in Housing Connections.

### **Substandard Housing Relocation Program**

PHB contracted with the Impact Northwest to operate a relocation program for low-income residents displaced due to code enforcement, lead paint hazards, serious mold and significant fires. Code enforcement actions include building closure and vacancy orders issued by the City's Bureau of Development Services (BDS) and Fire Bureau because of unsafe housing conditions. This year, 48 households were relocated through the program.

### **Shared Housing Program**

Ecumenical Ministries of Oregon (EMO) operates the Shared Housing Program which helps elderly and other low- and moderate- income residents of Portland locate, evaluate, and select shared housing and living situations that meet their economic and social needs. Shared housing includes the option for the renter to perform household services in exchange for reduced or no rent. This service includes listing both home providers and people seeing rooms for rent, background screening for both parties, a matching service, and suggestions about rental contracts that protects both parties. In total 283 individuals were served, of which 79% were 0-30% MFI. One hundred and forty (140) homeshares were facilitated.

### **Rent Well Tenant Education Program**

The Rent Well Tenant Education Program (formally called the Ready to Rent Program) is a program that has increased access to housing for individuals and households who have had difficulty meeting the tenant screening criteria due to criminal history, and poor credit and rental histories. The program includes a tenant education training designed address screening barriers and help rent successfully in the future. Graduates of the training are eligible for coverage from a guarantee fund that provides some financial compensation to the landlord or property manager if the tenant damages the unit or vacates the unit without full payment. In FY 2010-11 PHB continued to contract with Home Forward (formerly Housing Authority of Portland) to administer the Rent Well



Tenant Education Program Landlord Guarantee Fund. PHB also worked with Home Forward and regional partners to implement the new Rent Well curriculum to better meet the needs of the target population. See outcomes in the Fair Housing Outcome Table. This program was not funded with federal funds in FY 2010-11.

**CDBG/HOME Project Support Program**

The CDBG/HOME Project Support Program of 2010-2011 provided funds to eligible non-profit community based corporations. The HOME CHDO operating support is used to provide financial support to CHDOs engaged in the development of HOME-funded projects. The CDBG funding supports the staff work of nonprofits on CDBG-funded housing projects. In FY 10-11 a combined total of \$586,426 was allocated to 9 nonprofit organizations providing \$413,827 in CDBG funds and \$172,599 in HOME CHDO operating support.

<b>Organization</b>	<b>CDBG</b>	<b>HOME CHDO Operating Support</b>
Central City Concern	106,561	
Hacienda CDC	30,510	50,000
Human Solutions	49,434	73,700
Innovative Housing, Inc	37,087	
Native American Youth and Family Center	48,000	
Northwest Housing Alternatives	18,190	
PCRI	60,084	48,899
Proud Ground	35,776	
REACH CDC	28,186	
<b>Total</b>	<b>\$413,827</b>	<b>\$172,599</b>

PHB reviews funding proposals through its staff and Investment Committee which make funding recommendations to the Bureau Director. Any contracts over \$100,000 are also approved by City Council.

Individual projects supported by the CDBG funding are reported separately throughout the CAPER, many under the Rental Housing Loan program. The CHDO operating support allowed CHDOs to focus on affordable housing development by providing valuable organizational support to eligible organizations.

## Continuum of Care

### Overview/History

Portland and Multnomah County are committed to developing and maintaining a continuum of housing and services for low-income individuals and families, including those with disabilities, those at-risk of homelessness, and those experiencing homelessness. Since the mid-1980s, the community has worked collaboratively on a number of initiatives to reduce homelessness. Portland has been able to strengthen and improve all components of its homeless system by building and maintaining cooperative relationships among service providers and governmental bodies. This has included the Cities of Portland and Gresham, Multnomah County and Home Forward (formerly the Housing Authority of Portland or HAP), as well as fostering effective linkages between homeless facilities and services.

Since launching a 10-year plan to end homelessness in December 2004, the Coordinating Committee to End Homelessness (CCEH) has served as the lead entity for ongoing community planning. The committee provides broad-based feedback on implementation issues. It also is charged with updating the 10-Year Plan document over time so that it continues to be a viable tool in a changing environment. CCEH also develops strategies for ending homelessness that are incorporated into the annual competitive application for the Continuum of Care Homeless Assistance program.

Federal funds leverage significant other public and private funds to serve thousands of homeless and low income people each year. Below are results from four different areas within our Continuum.

### **Preventing & Ending Homelessness for Low-Income Individuals and Families**

Beginning in 2005, The Cities of Portland and Gresham, Multnomah County, and the Housing Authority of Portland (now known as Home Forward) consolidated multiple federal, state, and local funding sources into a single Short Term Rent Assistance (STRA) program to both prevent homelessness and assist homeless households in moving to permanent housing. Home Forward administers STRA. In consultation with the jurisdiction partners in winter 2008, Home Forward issued a consolidated RFP for the STRA program. Since July 1, 2008 Home Forward has contracted with an array of local agencies to successfully operate the STRA program.

The cities of Portland and Gresham allocate HOME funds for the provision of tenant based rent assistance. In addition, the City of Portland, Multnomah County, and the Housing Authority of Portland contribute an array of other funding sources for STRA including:

- City of Portland- General Funds/Housing Investment Funds
- Multnomah County- General Funds, and pass through State Funds such as FEMA and Low-Income Rental Fund (LIRF)
- Housing Authority - Payment in Lieu of Taxes (PILOT)

In fiscal year 2010-11, the City allocated \$320,000 of HOME Tenant Based Rent Assistance (TBRA) to STRA. HOME TBRA is typically used for those households who require a deep rental subsidy over a longer time period, while the more flexible general funds are utilized for a variety of household situations and financial needs.

In 2009, HUD awarded more than \$4.1M in American Recovery and Reinvestment Act (ARRA) stimulus dollars from the Homelessness Prevention and Rapid Re-housing Program (HPRP) to the City of Portland. Through a substantial amendment to the Consolidated Plan, regional funding partners chose to use the existing infrastructure of the STRA program as the primary system to deliver HPRP services, allocating \$3,973,668 of the HPRP award to the STRA program for expenditure between 2009 and 2011. The addition of HPRP funding to the STRA program roughly doubled the yearly funding to STRA for fiscal years 2009-10 and 2010-11. By the close of 2010-11, the STRA program has assisted 1,101 households with homelessness prevention and 372 households with homelessness assistance, expending more than \$3.65M (87% of full allocation).

All STRA sub recipients enter participant data in the City-led Homeless Management and Information System (HMIS) and provide regular shared outcomes reports that track unduplicated demographics for individuals/households served, eviction prevention and placement data, and long term retention in housing outcomes. Tables 1 and 2 summarize households served through STRA with non-HPRP resources, and Tables 3 and 4 summarize households served with HPRP funds.

**Table 1**

**Short-Term Rent Assistance (STRA) households prevented from becoming homeless (eviction prevention) with non-HPRP funds**

**Short Term Rent Assistance (Eviction Prevention) includes HPRP Funds**

**Report to Date (RTD): 7/1/10 - 6/30/11**

	<b>RTD</b>
Service Provider Programs	48
<b>Total Household Units</b>	<b>1,211</b>

<b>Gender</b>	<b>RTD</b>
Female	790
Male	418
Refused/Don't Know	
Missing Data Entry	1
<b>Ethnicity</b>	<b>RTD</b>
Hispanic/Latino	331
Not Hispanic/Latino	873
Refused/Don't Know	6
Missing Data Entry	
<b>Race</b>	<b>RTD</b>
American Indian or Alaska Native	77
Asian	14
Black or African American	310
Native Hawaiian or Other Pacific Islander	19
White	589
Don't Know / Refused	3
Missing Data Entry	
Other/Other Multi-Racial (includes other Non "HUD" Responses)	202
<b>Age Groups</b>	<b>RTD</b>
Under 5	662
5 to 17 years	1,493
18 to 24 years	418
25 to 54 years	1,713
55 to 61 years	280
62+ years	106
Missing Data Entry	11
<b>Median Family Income</b>	<b>RTD</b>
<i>Not required of all programs</i>	Household Units
0 - 30 %	24.11%
30 - 50 %	2.89%
50 - 80 %	0.08%
Over 80%	0.25%
Missing Data Entry	72.67%

<b>Heads of Households</b>	<b>RTD</b>
Female HOH	765
Senior HOH (Age 55+)	203
<b>Other Information</b>	<b>RTD</b>
Veteran	43
DV Victim/Survivor	204
Disability	337
<b>Disabling Conditions</b>	<b>RTD</b>
Physical	111
Developmental	19
Chronic Health Condition	19
HIV/AIDS	16
Mental Health problems	106
Alcohol Abuse	44
Drug Abuse	44
Both Alcohol and drug abuse	17

**Values at Program Entry:**

<b>At Entry Persons who were:</b>	<b>RTD</b>
Homeless	11
Chronic Homeless	
<b>Housing Status</b>	<b>RTD</b>
Literally Homeless	11
Imminently losing their housing	49
Unstably housed and at-risk of losing their housing	102
Stably housed	13
Unknown/Refused	
Missing Data Entry	2
<b>Entry Household Type</b>	<b>RTD</b>
<i>Based on Entry Group Structure</i>	Household Units
Households w/Children	832
Households of Only Children (<18)	5
Households of Only Adults (>= 18)	109
Households of Single Individuals	338

**Table 2**

**Short-Term Rent Assistance (STRA): Homeless households (from street or shelter) placed in housing with non-HPRP funds**

**Short Term Rent Assistance (Housing Placement) includes HPRP Funds**

**Report to Date (RTD): 7/1/10 - 6/30/11**

	RTD		RTD
Service Provider Programs	48		
Total Household Units	575		
<b>Gender</b>	<b>RTD</b>	<b>Heads of Households</b>	<b>RTD</b>
Female	315	Female HOH	308
Male	254	Senior HOH (Age 55+)	133
Refused/Don't Know		<b>Other Information</b>	<b>RTD</b>
Missing Data Entry		Veteran	34
<b>Ethnicity</b>	<b>RTD</b>	DV Victim/Survivor	112
Hispanic/Latino	61	Disability	337
Not Hispanic/Latino	503	<b>Disabling Conditions</b>	<b>RTD</b>
Refused/Don't Know	6	Physical	71
Missing Data Entry		Developmental	20
<b>Race</b>	<b>RTD</b>	Chronic Health Condition	14
American Indian or Alaska Native	33	HIV/AIDS	21
Asian	1	Mental Health problems	142
Black or African American	154	Alcohol Abuse	48
Native Hawaiian or Other Pacific Islander	9	Drug Abuse	74
White	339	Both Alcohol and drug abuse	18
Don't Know / Refused	1		
Missing Data Entry			
Other/Other Multi-Racial (includes other Non "HUD" Responses)	33		
<b>Age Groups</b>	<b>RTD</b>		
Under 5	662		
5 to 17 years	1,493		
18 to 24 years	418		
25 to 54 years	1,705		
55 to 61 years	276		
62+ years	106		
Missing Data Entry	11		
<b>Median Family Income</b>	<b>RTD</b>		
Not required of all programs	Household Units		
0 - 30 %	44.87%		
30 - 50 %	2.09%		
50 - 80 %	0.17%		
Over 80%	0.17%		
Missing Data Entry	52.70%		
		<b>Values at Program Entry:</b>	
		<b>At Entry Persons who were:</b>	<b>RTD</b>
		Homeless	32
		Chronic Homeless	4
		<b>Housing Status</b>	<b>RTD</b>
		Literally Homeless	20
		Imminently losing their housing	16
		Unstably housed and at-risk of losing their housing	32
		Stably housed	7
		Unknown/Refused	
		Missing Data Entry	1
		<b>Entry Household Type</b>	<b>RTD</b>
		Based on Entry Group Structure	Household Units
		Households w/Children	241
		Households of Only Children (<18)	5
		Households of Only Adults (>= 18)	76
		Households of Single Individuals	281

**Table 3**

**Short-Term Rent Assistance (STRA) households prevented from becoming homeless (eviction prevention) with HPRP funds**

**Short Term Rent Assistance (Eviction Prevention) HPRP Funds ONLY**

**Report to Date (RTD): 7/1/10 - 6/30/11**

	<b>RTD</b>
Service Provider Programs	29
Total Household Units	676

<b>Gender</b>	<b>RTD</b>
Female	447
Male	236
Refused/Don't Know	
Missing Data Entry	

<b>Ethnicity</b>	<b>RTD</b>
Hispanic/Latino	234
Not Hispanic/Latino	443
Refused/Don't Know	6
Missing Data Entry	

<b>Race</b>	<b>RTD</b>
American Indian or Alaska Native	33
Asian	9
Black or African American	145
Native Hawaiian or Other Pacific Islander	11
White	346
Don't Know / Refused	2
Missing Data Entry	
Other/Other Multi-Racial (includes other Non "HUD" Responses)	139

<b>Age Groups</b>	<b>RTD</b>
Under 5	350
5 to 17 years	907
18 to 24 years	200
25 to 54 years	928
55 to 61 years	140
62+ years	44
Missing Data Entry	7

<b>Median Family Income</b>	<b>RTD</b>
Not required of all programs	Household Units
0 - 30 %	27.51%
30 - 50 %	2.81%
50 - 80 %	
Over 80%	0.44%
Missing Data Entry	69.23%

<b>Heads of Households</b>	<b>RTD</b>
Female HOH	429
Senior HOH (Age 55+)	113
<b>Other Information</b>	<b>RTD</b>
Veteran	21
DV Victim/Survivor	102
Disability	178
<b>Disabling Conditions</b>	<b>RTD</b>
Physical	59
Developmental	10
Chronic Health Condition	7
HIV/AIDS	5
Mental Health problems	53
Alcohol Abuse	19
Drug Abuse	20
Both Alcohol and drug abuse	11

**Values at Program Entry:**

<b>At Entry Persons who were:</b>	<b>RTD</b>
Homeless	8
Chronic Homeless	

<b>Housing Status</b>	<b>RTD</b>
Literally Homeless	7
Imminently losing their housing	35
Unstably housed and at-risk of losing their housing	46
Stably housed	5
Unknown/Refused	
Missing Data Entry	

<b>Entry Household Type</b>	<b>RTD</b>
Based on Entry Group Structure	Household Units
Households w/Children	485
Households of Only Children (<18)	2
Households of Only Adults (>= 18)	49
Households of Single Individuals	155

**Table 4**

**Short-Term Rent Assistance (STRA): Homeless households (from street or shelter) placed in housing with HPRP funds**

**Short Term Rent Assistance (Eviction Prevention) HPRP Funds ONLY**

Report to Date (RTD): 7/1/10 - 6/30/11

	RTD
Service Provider Programs	29
Total Household Units	325

Gender	RTD
Female	187
Male	133
Refused/Don't Know	
Missing Data Entry	
Ethnicity	RTD
Hispanic/Latino	33
Not Hispanic/Latino	285
Refused/Don't Know	2
Missing Data Entry	
Race	RTD
American Indian or Alaska Native	22
Asian	
Black or African American	99
Native Hawaiian or Other Pacific Islander	4
White	178
Don't Know / Refused	
Missing Data Entry	
Other/Other Multi-Racial (includes other Non "HUD" Responses)	17
Age Groups	RTD
Under 5	350
5 to 17 years	907
18 to 24 years	200
25 to 54 years	927
55 to 61 years	140
62+ years	44
Missing Data Entry	7
Median Family Income	RTD
Not required of all programs	Household Units
0 - 30 %	50.15%
30 - 50 %	1.85%
50 - 80 %	
Over 80%	
Missing Data Entry	48.00%

Heads of Households	RTD
Female HOH	183
Senior HOH (Age 55+)	65
Other Information	RTD
Veteran	18
DV Victim/Survivor	59
Disability	177
Disabling Conditions	RTD
Physical	36
Developmental	10
Chronic Health Condition	9
HIV/AIDS	2
Mental Health problems	78
Alcohol Abuse	27
Drug Abuse	38
Both Alcohol and drug abuse	15

**Values at Program Entry:**

At Entry Persons who were:	RTD
Homeless	18
Chronic Homeless	3
Housing Status	RTD
Literally Homeless	11
Imminently losing their housing	12
Unstably housed and at-risk of losing their housing	15
Stably housed	2
Unknown/Refused	
Missing Data Entry	
Entry Household Type	RTD
Based on Entry Group Structure	Household Units
Households w/Children	129
Households of Only Children (<18)	2
Households of Only Adults (>= 18)	44
Households of Single Individuals	147

## Short Term Rent Assistance (Eviction Prevention) Without HPRP

### Short Term Rent Assistance (Eviction Prevention)

Report to Date (RTD): 7/1/10 - 6/30/11

	RTD
Service Provider Programs	19
Total Household Units	594

Gender	RTD
Female	381
Male	207
Refused/Don't Know	
Missing Data Entry	1
Ethnicity	RTD
Hispanic/Latino	112
Not Hispanic/Latino	476
Refused/Don't Know	2
Missing Data Entry	
Race	RTD
American Indian or Alaska Native	44
Asian	7
Black or African American	178
Native Hawaiian or Other Pacific Islander	11
White	275
Don't Know / Refused	1
Missing Data Entry	
Other/Other Multi-Racial (includes other Non "HUD" Responses)	74
Age Groups	RTD
Under 5	355
5 to 17 years	678
18 to 24 years	234
25 to 54 years	889
55 to 61 years	159
62+ years	68
Missing Data Entry	4
Median Family Income	RTD
<i>Not required of all programs</i>	Household Units
0 - 30 %	20.88%
30 - 50 %	3.54%
50 - 80 %	0.17%
Over 80%	
Missing Data Entry	75.42%

Heads of Households	RTD
Female HOH	372
Senior HOH (Age 55+)	102
Other Information	RTD
Veteran	25
DV Victim/Survivor	112
Disability	177
Disabling Conditions	RTD
Physical	58
Developmental	9
Chronic Health Condition	12
HIV/AIDS	11
Mental Health problems	59
Alcohol Abuse	26
Drug Abuse	24
Both Alcohol and drug abuse	6

#### Values at Program Entry:

At Entry Persons who were:	RTD
Homeless	4
Chronic Homeless	
Housing Status	RTD
Literally Homeless	4
Imminently losing their housing	15
Unstably housed and at-risk of losing their housing	57
Stably housed	8
Unknown/Refused	
Missing Data Entry	2
Entry Household Type	RTD
<i>Based on Entry Group Structure</i>	Household Units
Households w/Children	347
Households of Only Children (<18)	3
Households of Only Adults (>= 18)	60
Households of Single Individuals	199



## **Addressing Emergency and Transitional Housing Needs of Homeless People**

### ***Adults***

In 2009-10 the City of Portland and Multnomah County funded three shelters for homeless men, a shelter for homeless women, a shelter/transitional facility for homeless women, and a seasonal warming center facility for men, women, and couples without children. Other privately funded providers offer shelter as well. Community wide, publicly- and privately-funded providers support year-round shelter capacity to serve 357 adults per night. Seasonal beds serve an additional 290.

The City of Portland and Multnomah County also continued to fund two collaborative programs offering a mix of immediate safety off the street and rapid placement into permanent housing with ongoing home-based retention support for female-headed households. The largest of these programs is a four agency partnership which forms the Women's Emergency Service Collaborative (WESC), which began operating in September 2005. [See Table 5]

In FY 2009-10, HUD Continuum of Care (CoC) grants continued to fund several transitional programs: transitional housing in scattered sites with homeless adults from Transition Projects and Northwest Pilot Project, the Royal Palm for individuals with severe and persistent mental illness, and domestic violence leasing sites. McKinney grants also support alcohol and drug free transitional housing for single adults, transitional housing for homeless women at Jean's Place, housing placement services for people with mental illness and/or developmental disabilities, ADFC transitional housing for homeless single adults who are entering the workforce, and permanent supportive housing projects. [See Table 6]

### ***Youth***

The Homeless Youth Service Continuum provides services and support to homeless youth ages 13-24 years. The City of Portland and Multnomah County-funded services for homeless youth include: day program services, emergency shelter, short-term shelter, transitional housing, independent housing, case management, employment and education services. Community wide, publicly- and privately-funded providers support year-round emergency shelter capacity to serve 55 youth per night.

The City of Portland provided General Funds to Multnomah County to operate the Janus Youth, Short Term Shelter as well as transitional housing facilities and scattered-site apartments operated by New Avenues for Youth and Outside In. HUD CoC program funds transitional housing mental health services, case management, and permanent supportive housing for homeless youth. [See Table 7]

## Short Term Rent Assistance (Placed in Housing) Without HPRP Adults

### Short Term Rent Assistance (Eviction Prevention)

Report to Date (RTD): 7/1/10 - 6/30/11

	RTD
Service Provider Programs	19
Total Household Units	294

Gender	RTD
Female	151
Male	142
Refused/Don't Know	
Missing Data Entry	

Ethnicity	RTD
Hispanic/Latino	32
Not Hispanic/Latino	258
Refused/Don't Know	4
Missing Data Entry	

Race	RTD
American Indian or Alaska Native	14
Asian	1
Black or African American	67
Native Hawaiian or Other Pacific Islander	7
White	186
Don't Know / Refused	1
Missing Data Entry	
Other/Other Multi-Racial (includes other Non "HUD" Responses)	18

Age Groups	RTD
Under 5	355
5 to 17 years	678
18 to 24 years	234
25 to 54 years	886
55 to 61 years	158
62+ years	68
Missing Data Entry	4

Median Family Income	RTD
Not required of all programs	Household Units
0 - 30 %	38.78%
30 - 50 %	2.04%
50 - 80 %	0.34%
Over 80%	0.34%
Missing Data Entry	58.50%

Heads of Households	RTD
Female HOH	148
Senior HOH (Age 55+)	79
Other Information	RTD
Veteran	19
DV Victim/Survivor	64
Disability	185
Disabling Conditions	RTD
Physical	40
Developmental	12
Chronic Health Condition	5
HIV/AIDS	19
Mental Health problems	76
Alcohol Abuse	24
Drug Abuse	38
Both Alcohol and drug abuse	3

#### Values at Program Entry:

At Entry Persons who were:	RTD
Homeless	16
Chronic Homeless	1

Housing Status	RTD
Literally Homeless	10
Imminently losing their housing	4
Unstably housed and at-risk of losing their housing	17
Stably housed	5
Unknown/Refused	
Missing Data Entry	1

Entry Household Type	RTD
Based on Entry Group Structure	Household Units
Households w/Children	112
Households of Only Children (<18)	3
Households of Only Adults (>= 18)	32
Households of Single Individuals	155

**Table 5**

**Transitional Housing for Single Adult Clients Served**

**Transitional Housing**

**Report to Date (RTD): 7/1/10 - 6/30/11**

	<b>RTD</b>
Service Provider Programs	16
Total Unique (Unduplicated) Clients	1,553
Total Household Units	887

<b>Gender</b>	<b>RTD</b>
Female	1,003
Male	536
Refused/Don't Know	
Missing Data Entry	12
<b>Ethnicity</b>	<b>RTD</b>
Hispanic/Latino	247
Not Hispanic/Latino	1,260
Refused/Don't Know	33
Missing Data Entry	12
<b>Race</b>	<b>RTD</b>
American Indian or Alaska Native	98
Asian	17
Black or African American	350
Native Hawaiian or Other Pacific Islander	34
White	886
Don't Know / Refused	27
Missing Data Entry	13
Other/Other Multi-Racial (includes other Non "HUD" Responses)	132
<b>Age Groups</b>	<b>RTD</b>
Under 5	236
5 to 17 years	327
18 to 24 years	169
25 to 54 years	678
55 to 61 years	103
62+ years	20
Missing Data Entry	20
<b>Median Family Income</b>	<b>RTD</b>
<i>Not required of all programs</i>	Household Units
0 - 30 %	50.17%
30 - 50 %	0.34%
50 - 80 %	0.23%
Over 80%	
Missing Data Entry	49.94%

<b>Heads of Households</b>	<b>RTD</b>
Female HOH	663
Senior HOH (Age 55+)	115
<b>Other Information</b>	<b>RTD</b>
Veteran	37
DV Victim/Survivor	508
Disability	550
<b>Disabling Conditions</b>	<b>RTD</b>
Physical	92
Developmental	24
Chronic Health Condition	34
HIV/AIDS	1
Mental Health problems	352
Alcohol Abuse	103
Drug Abuse	154
Both Alcohol and drug abuse	37

**Values at Program Entry:**

<b>At Entry Persons who were:</b>	<b>RTD</b>
Homeless	
Chronic Homeless	
<b>Housing Status</b>	<b>RTD</b>
Literally Homeless	
Imminently losing their housing	
Unstably housed and at-risk of losing their housing	
Stably housed	
Unknown/Refused	
Missing Data Entry	
<b>Entry Household Type</b>	<b>RTD</b>
<i>Based on Entry Group Structure</i>	Household Units
Households w/Children	
Households of Only Children (<18)	
Households of Only Adults (>= 18)	
Households of Single Individuals	561

**Table 6- PSH Housing for persons with disabilities**

**PSH Housing**

**Report to Date (RTD):** 7/1/10 - 6/30/11

	RTD
Service Provider Programs	26
Total Unique (Unduplicated) Clients	788
Total Household Units	727

<b>Gender</b>	RTD
Female	295
Male	492
Refused/Don't Know	
Missing Data Entry	
<b>Ethnicity</b>	RTD
Hispanic/Latino	50
Not Hispanic/Latino	735
Refused/Don't Know	1
Missing Data Entry	
<b>Race</b>	RTD
American Indian or Alaska Native	31
Asian	14
Black or African American	174
Native Hawaiian or Other Pacific Islander	4
White	537
Don't Know / Refused	
Missing Data Entry	1
Other/Other Multi-Racial (includes other Non "HUD" Responses)	27
<b>Age Groups</b>	RTD
Under 5	13
5 to 17 years	36
18 to 24 years	40
25 to 54 years	486
55 to 61 years	157
62+ years	53
Missing Data Entry	3
<b>Median Family Income</b>	RTD
Not required of all programs	Household Units
0 - 30 %	31.91%
30 - 50 %	0.41%
50 - 80 %	0.14%
Over 80%	
Missing Data Entry	67.68%

<b>Heads of Households</b>	RTD
Female HOH	258
Senior HOH (Age 55+)	202
<b>Other Information</b>	RTD
Veteran	60
DV Victim/Survivor	123
Disability	704
<b>Disabling Conditions</b>	RTD
Physical	48
Developmental	10
Chronic Health Condition	46
HIV/AIDS	100
Mental Health problems	455
Alcohol Abuse	259
Drug Abuse	328
Both Alcohol and drug abuse	47

**Values at Program Entry:**

<b>At Entry Persons who were:</b>	RTD
Homeless	55
Chronic Homeless	8
<b>Housing Status</b>	RTD
Literally Homeless	45
Imminently losing their housing	2
Unstably housed and at-risk of losing their housing	18
Stably housed	27
Unknown/Refused	
Missing Data Entry	34
<b>Entry Household Type</b>	RTD
Based on Entry Group Structure	Household Units
Households w/Children	41
Households of Only Children (<18)	
Households of Only Adults (>= 18)	17
Households of Single Individuals	685

**Table 7**

**Homeless Youth Clients Served**  
**Homeless Youth Programs Clients Served**

**Report to Date (RTD):** 7/1/10 - 6/30/11

	RTD
Service Provider Programs	2
Total Unique (Unduplicated) Clients	85
Total Household Units	85

<b>Gender</b>	RTD
Female	37
Male	48
Refused/Don't Know	
Missing Data Entry	
<b>Ethnicity</b>	RTD
Hispanic/Latino	11
Not Hispanic/Latino	74
Refused/Don't Know	
Missing Data Entry	
<b>Race</b>	RTD
American Indian or Alaska Native	2
Asian	1
Black or African American	21
Native Hawaiian or Other Pacific Islander	1
White	49
Don't Know / Refused	
Missing Data Entry	
Other/Other Multi-Racial (includes other Non "HUD" Responses)	11
<b>Age Groups</b>	RTD
Under 5	
5 to 17 years	1
18 to 24 years	82
25 to 54 years	2
55 to 61 years	
62+ years	
Missing Data Entry	
<b>Median Family Income</b>	RTD
<i>Not required of all programs</i>	Household Units
0 - 30 %	20.00%
30 - 50 %	
50 - 80 %	
Over 80%	
Missing Data Entry	80.00%

<b>Heads of Households</b>	RTD
Female HOH	33
Senior HOH (Age 55+)	
<b>Other Information</b>	RTD
Veteran	1
DV Victim/Survivor	8
Disability	18
<b>Disabling Conditions</b>	RTD
Physical	
Developmental	1
Chronic Health Condition	
HIV/AIDS	
Mental Health problems	21
Alcohol Abuse	6
Drug Abuse	3
Both Alcohol and drug abuse	1

**Values at Program Entry:**

<b>At Entry Persons who were:</b>	RTD
Homeless	
Chronic Homeless	
<b>Housing Status</b>	RTD
Literally Homeless	
Imminently losing their housing	
Unstably housed and at-risk of losing their housing	
Stably housed	
Unknown/Refused	
Missing Data Entry	
<b>Entry Household Type</b>	RTD
<i>Based on Entry Group Structure</i>	Household Units
Households w/Children	
Households of Only Children (<18)	
Households of Only Adults (>= 18)	
Households of Single Individuals	87

**Families**

The Multnomah County Department of School and Community Partnerships continue to coordinate the School-Aged Policy Framework, now known as the SUN Service System, and provide anti-poverty services and emergency services throughout Multnomah County. The City of Gresham contributes funds to support transitional housing programs in East County.

Multnomah County and the City of Portland fund winter shelter services from November through March. This includes emergency shelter beds, case management, day shelter services and a phone-based shelter access line. Families placed in permanent housing through the winter shelter program receive on-going case management and follow-up services for a 12-month period. There are two year-round family shelters and multiple emergency motel voucher providers that provide 147 shelter beds for families per night.

The City of Portland provides a small General Fund Grant to Multnomah County for their Winter Shelter program for Families. [See Table 8]

Homeless families with children are also served via several grants from the City of Portland, including grants specifically focused on moving chronically homeless families directly from the street and into permanent housing, as well as a street outreach/engagement agency who serves the diverse population who are sleeping outside, including families with children. [See Table 9]

***Permanent Supportive Housing for adults and families***

HUD McKinney grants support several permanent supportive housing projects, some for chronically homeless individuals. In addition, HUD CoC also funds seven Shelter Plus Care grants providing nearly 500 vouchers that are administered by the Housing Authority of Portland. [See Table 10]

**Table 8**

**Homeless Families Served in Winter Shelter**

**Transitional Housing**

**Report to Date (RTD): 7/1/10 - 6/30/11**

	<b>RTD</b>
Service Provider Programs	16
Total Unique (Unduplicated) Clients	1,553
Total Household Units	887

<b>Gender</b>	<b>RTD</b>
Female	1,003
Male	536
Refused/Don't Know	
Missing Data Entry	12
<b>Ethnicity</b>	<b>RTD</b>
Hispanic/Latino	247
Not Hispanic/Latino	1,260
Refused/Don't Know	33
Missing Data Entry	12
<b>Race</b>	<b>RTD</b>
American Indian or Alaska Native	98
Asian	17
Black or African American	350
Native Hawaiian or Other Pacific Islander	34
White	886
Don't Know / Refused	27
Missing Data Entry	13
Other/Other Multi-Racial (includes other Non "HUD" Responses)	132
<b>Age Groups</b>	<b>RTD</b>
Under 5	236
5 to 17 years	327
18 to 24 years	169
25 to 54 years	678
55 to 61 years	103
62+ years	20
Missing Data Entry	20
<b>Median Family Income</b>	<b>RTD</b>
<i>Not required of all programs</i>	Household Units
0 - 30 %	50.17%
30 - 50 %	0.34%
50 - 80 %	0.23%
Over 80%	
Missing Data Entry	49.94%

<b>Heads of Households</b>	<b>RTD</b>
Female HOH	663
Senior HOH (Age 55+)	115
<b>Other Information</b>	<b>RTD</b>
Veteran	37
DV Victim/Survivor	508
Disability	550
<b>Disabling Conditions</b>	<b>RTD</b>
Physical	92
Developmental	24
Chronic Health Condition	34
HIV/AIDS	1
Mental Health problems	352
Alcohol Abuse	103
Drug Abuse	154
Both Alcohol and drug abuse	37

**Values at Program Entry:**

<b>At Entry Persons who were:</b>	<b>RTD</b>
Homeless	711
Chronic Homeless	26
<b>Housing Status</b>	<b>RTD</b>
Literally Homeless	681
Imminently losing their housing	18
Unstably housed and at-risk of losing their housing	67
Stably housed	11
Unknown/Refused	
Missing Data Entry	207
<b>Entry Household Type</b>	<b>RTD</b>
<i>Based on Entry Group Structure</i>	Household Units
Households w/Children	327
Households of Only Children (<18)	2
Households of Only Adults (>= 18)	16
Households of Single Individuals	



**Table 9**

**Transitional Housing for Families Clients Served**

**Households/Clients Served: 7/1/09 - 6/30/10**

<b>Total Number of Service Providers</b>	16
<b>Total Clients</b>	963
<b>Total Households</b>	325

<b>Gender</b>	
Female	584
Male	372
Refused/Don't Know	
Gender not reported	7
<b>Ethnicity</b>	
Hispanic/Latino	199
Not Hispanic/Latino	757
Refused/Don't Know	
Ethnicity not reported	7
<b>Race</b>	
American Indian or Alaska Native	60
Asian	7
Black or African American	250
Native Hawaiian or Other Pacific Islander	26
White	494
Don't Know / Refused	
Race not reported	8
Other/Other Multi-Racial (includes other Non "HUD" Responses)	126
<b>Age Groups</b>	
Under 5	225
5 to 17 years	317
18 to 24 years	98
25 to 54 years	308
55 to 61 years	6
62 to 84 years	2
85+ years	
Age not reported	7
	<b>% Household Units</b>
<b>Median Family Income Breakout</b>	
0 - 30%	16.92%
30 - 50%	
50% +	
MFI not reported	87.38%

<b>Heads of Households</b>	
Female HOH	275
Senior HOH	4
<b>Other Information</b>	
Veteran	13
DV Victim/Survivor	290
Has a Disabling Condition	154
<b>Disabling Conditions</b>	
Physical	15
Developmental	11
Chronic Health Condition	2
HIV/AIDS	
Mental Health problems	65
Alcohol Abuse	16
Drug Abuse	44
Both Alcohol and drug abuse	9

<b>At Entry Persons who were:</b>	
Homeless	618
Chronic Homeless	10
<b>Housing Status [5]</b>	
Literally Homeless	495
Imminently losing their housing	9
Unstably housed and at-risk of losing their housing	33
Stably housed	12
Unknown/Refused	
Housing Status not reported	371



**Table 10**

**Permanent Supportive Housing, including Shelter + Care Clients Served  
Permanent Supportive Housing, including Shelter Plus Care**

**Report to Date (RTD): 7/1/10 - 6/30/11**

	<b>RTD</b>
Service Provider Programs	26
Total Unique (Unduplicated) Clients	792
Total Household Units	731

<b>Gender</b>	<b>RTD</b>
Female	296
Male	495
Refused/Don't Know	
Missing Data Entry	
<b>Ethnicity</b>	<b>RTD</b>
Hispanic/Latino	50
Not Hispanic/Latino	741
Refused/Don't Know	1
Missing Data Entry	
<b>Race</b>	<b>RTD</b>
American Indian or Alaska Native	32
Asian	14
Black or African American	174
Native Hawaiian or Other Pacific Islander	4
White	540
Don't Know / Refused	
Missing Data Entry	1
Other/Other Multi-Racial (includes other Non "HUD" Responses)	27
<b>Age Groups</b>	<b>RTD</b>
Under 5	13
5 to 17 years	36
18 to 24 years	40
25 to 54 years	489
55 to 61 years	158
62+ years	53
Missing Data Entry	3
<b>Median Family Income</b>	<b>RTD</b>
<i>Not required of all programs</i>	Household Units
0 - 30 %	32.15%
30 - 50 %	0.41%
50 - 80 %	0.14%
Over 80%	
Missing Data Entry	67.44%

<b>Heads of Households</b>	<b>RTD</b>
Female HOH	259
Senior HOH (Age 55+)	203
<b>Other Information</b>	<b>RTD</b>
Veteran	60
DV Victim/Survivor	123
Disability	708
<b>Disabling Conditions</b>	<b>RTD</b>
Physical	48
Developmental	10
Chronic Health Condition	46
HIV/AIDS	100
Mental Health problems	455
Alcohol Abuse	263
Drug Abuse	330
Both Alcohol and drug abuse	47

**Values at Program Entry:**

<b>At Entry Persons who were:</b>	<b>RTD</b>
Homeless	56
Chronic Homeless	8
<b>Housing Status</b>	<b>RTD</b>
Literally Homeless	46
Imminently losing their housing	2
Unstably housed and at-risk of losing their housing	18
Stably housed	27
Unknown/Refused	
Missing Data Entry	34
<b>Entry Household Type</b>	<b>RTD</b>
<i>Based on Entry Group Structure</i>	Household Units
Households w/Children	41
Households of Only Children (<18)	
Households of Only Adults (>= 18)	17
Households of Single Individuals	689

## **Households Impacted by Domestic Violence**

Funds from the State of Oregon (SHAP and resources designated specifically for services for survivors of domestic violence funded through Department of Human Services and the Department of Justice), US Department of Justice (Office of Violence Against Women Transitional Housing and other grants designated for Domestic Violence victim services) , and Multnomah County were used for programs that provide domestic violence victim services, including shelter, transitional housing, culturally specific services, crisis lines, advocacy, safety planning, and access to services through co-located advocates at the Courthouse, Child Welfare office and other sites. These activities were coordinated with other resources and programs dedicated to the reduction of domestic violence, including a significant amount of private funding/donations.

The current HUD Horizon award to Multnomah County and Bradley Angle supported rent assistance and supportive services to victims of domestic violence with a focus on survivors with the greatest barriers to success in housing including language/culture/immigration status, lack of education, lack of or poor work history, criminal histories, health/mental health issues, and other significant barriers to successful placement in permanent housing. HUD McKinney funds also support transitional housing for women and children at the West Women's facility.

[See Table 11]

**Table 11**

**Continuum-wide Survivors of Domestic Violence Served**

Note that the Violence Against Women Act prohibits victim service providers to use HMIS. As such, this table reflects very limited information regarding DV victims/survivors served.

**Victims of Domestic Violence**

**Report to Date (RTD):** 7/1/10 - 6/30/11

	RTD
Service Provider Programs	276
Total Unique (Unduplicated) Clients	18,655
Total Household Units	13,477

Gender	RTD
Female	8,163
Male	10,406
Refused/Don't Know	5
Missing Data Entry	57
Ethnicity	RTD
Hispanic/Latino	3,192
Not Hispanic/Latino	15,110
Refused/Don't Know	290
Missing Data Entry	115
Race	RTD
American Indian or Alaska Native	1,253
Asian	306
Black or African American	3,807
Native Hawaiian or Other Pacific Islander	233
White	11,121
Don't Know / Refused	186
Missing Data Entry	97
Other/Other Multi-Racial (includes other Non "HUD" Responses)	1,787
Age Groups	RTD
Under 5	1,568
5 to 17 years	2,972
18 to 24 years	2,126
25 to 54 years	8,789
55 to 61 years	2,165
62+ years	915
Missing Data Entry	120
Median Family Income	RTD
Not required of all programs	Household Units
0 - 30 %	39.11%
30 - 50 %	3.01%
50 - 80 %	0.63%
Over 80%	0.32%
Missing Data Entry	58.43%

Heads of Households	RTD
Female HOH	5,131
Senior HOH (Age 55+)	2,915
Other Information	RTD
Veteran	1,234
DV Victim/Survivor	2,453
Disability	8,323
Disabling Conditions	RTD
Physical	1,452
Developmental	323
Chronic Health Condition	392
HIV/AIDS	2,082
Mental Health problems	3,710
Alcohol Abuse	1,358
Drug Abuse	1,666
Both Alcohol and drug abuse	479

**Values at Program Entry:**

At Entry Persons who were:	RTD
Homeless	852
Chronic Homeless	45
Housing Status	RTD
Literally Homeless	690
Imminently losing their housing	77
Unstably housed and at-risk of losing their housing	258
Stably housed	87
Unknown/Refused	
Missing Data Entry	198
Entry Household Type	RTD
Based on Entry Group Structure	Household Units
Households w/Children	1,213
Households of Only Children (<18)	2
Households of Only Adults (>= 18)	85
Households of Single Individuals	1,236

## Activities to Address the Worst Case Need

HUD defines "worst case need" as any household which has an income less than 50 percent of the area media income, and pays over half its income for housing costs or is living in severely substandard housing.

In Multnomah County, there are over 41,575 households with incomes below 50% median family income who pay over 50% of their income for housing related expenses.

The Consortium continues to focus its housing development programs on housing production that serves these populations. In 2010-2011, PHB used funds to develop 44 units for households with incomes up to 30% MFI, and 130 units for households with incomes between 31% and 50% MFI.

### Rental Units Financed 2010-2011 (Households 30%-50% MFI)

Units	0-30%	30-50%	51-60%	61-80%	81+
47	17	23	7	0	0
30	29	0	0	0	1
28	28	0	0	0	0
22	10	0	12	0	0
24	6	17	0	0	1
12	0	0	12	0	0
0	0	0	0	0	0
<b>163</b>	<b>90</b>	<b>40</b>	<b>31</b>	<b>0</b>	<b>2</b>

Source: Portland Housing Bureau \*Financed means, reserved, committed, closed

## Persons with Disabilities and Special Needs

The 2005-2011 Consolidated Plan set an overall six-year program goal of developing 400 units of 0-30% rental housing. The Plan did not set a minimum goal for special needs housing. However, the key objective for the housing is to meet the need for permanent supportive housing to support the Ten Year Plan to End Homelessness in the City of Portland and Multnomah County. The majority of homeless persons who will receive permanent supportive housing under the Ten-Year Plan have mental, physical, developmental, or addiction disabilities that qualify them as persons with special needs. This goal is within reach, in large part due to funding sources that target populations with special needs. Some of these resources include federal Section 202 (elderly) and 811 (disabled) programs, State of Oregon bonds for elderly and disabled housing, and the HOPWA program that provides housing for people living with HIV/AIDS. The City of Portland leverages dollars contributed by other community partners to meet the overall goal.

Housing services are provided for developmentally, mentally, and physically disabled individuals through a continuum of care, offering supervised housing, case management, and other services with varying degrees of structure.

## **Helping Homeless Persons Make the Transition to Permanent Housing and Independent Living**

### ***Housing First***

One of the core principles of the Portland & Multnomah County Ten-Year Plan to End Homelessness is that in order for individuals to successfully transition from homelessness to permanent housing and independent living, they must be able to access housing first.

Many of the rent assistance programs described above have assisted homeless people to access housing, including the multi-jurisdictional STRA program. Several other locally- and federally-funded rent assistance programs, including the City funded Key-Not-a-Card program, helped to place homeless individuals directly from the street into permanent housing using housing-first program models. In FY 2010-2011, these programs achieved significant successes in housing placement and retention through flexible client-centered assistance. [See Table 12]

Additionally, the McKinney SRO Section 8 Mod Rehab Program provided ongoing rent assistance for formerly homeless individuals in these buildings: the Rose (for women), the Sally McCracken, the Barbara Maher (for women), and the Mark O. Hatfield.

**Table 12**

**Permanent Housing Placement and Retention Outcomes (CY 2009)**

<b>Number HHs who received placements: (2)</b>	<b>HH w/ Children</b>	<b>HH w/ Children</b>	<b>Other HH</b>	<b>Other HH</b>
<b>Subset: HRF, CHI, OR NON (8)</b>	<b>HRF</b>	<b>NON</b>	<b>CHI</b>	<b>NON</b>
<b>Permanent Housing</b>	152	222	539	921
<b>Eviction Prevention</b>	182	467	53	616
<b>Transitional Housing</b>	7	20	82	185
<b>Hotel/Motel Voucher</b>	35	24	67	151

<b>Permanent Placements (2)</b>	<b>Amount due for Follow-Up</b>	<b>Amount in Housing</b>	<b>Amount Contacted</b>	<b>Of those contacted retention rate:</b>
<b>3 Months</b>	1,754	1,514	1,665	1,514 / 1,665
<b>Percentage Rate (3)</b>	-	86.32%	94.93%	<b>90.93%</b>
<b>6 Months</b>	2,057	1,647	1,861	1,647 / 1,861
<b>Percentage Rate (3)</b>	-	80.07%	90.47%	<b>88.50%</b>
<b>12 Months</b>	2,028	1,469	1,748	1,469 / 1,748
<b>Percentage Rate (3)</b>	-	72.44%	86.19%	<b>84.04%</b>

<b>Number HHs who received placements: (2)</b>	<b>Other HH</b>
<b>Subset: HRF, CHI, OR NON (8)</b>	<b>CHI</b>
<b>Permanent Housing</b>	<b>539</b>

**Of the placements made prior to...**

<b>Permanent Placements (2)</b>	<b>Amount due for Follow-Up</b>	<b>Amount in Housing</b>	<b>Amount Contacted</b>	<b>Of those contacted retention rate:</b>
<b>3 Months</b>	512	449	501	449 / 501
<b>Percentage Rate (3)</b>	-	87.70%	97.85%	<b>89.62%</b>
<b>6 Months</b>	591	473	551	473 / 551
<b>Percentage Rate (3)</b>	-	80.03%	93.23%	<b>85.84%</b>
<b>12 Months</b>	600	432	539	432 / 539
<b>Percentage Rate (3)</b>	-	72.00%	89.83%	<b>80.15%</b>

### ***Increasing economic opportunity for homeless people***

For thousands of Portland's homeless residents, access to employment and economic opportunity is the solution to ending homelessness in their lives. In calendar year 2010, community providers achieved the following successes:

- 493 individuals experiencing homelessness received employment assistance and training through Portland Development Commission's Economic Opportunity Initiative (EOI). Of those, 303 individuals secured employment and/or employment training.
- 3,600 individuals experiencing homelessness received services at the Employment Access Center. 988 received individualized supported employment services and, of these, 510 secured employment through 368 employers with an average wage of \$13.46 per hour.
- 287 families experiencing homelessness or at risk of homelessness received basic needs and employment services through the Action for Prosperity Project (AFP). 175 (61%) of parents were employed by program exit.
- Central City Concern's Benefits & Eligibility Specialists Team (BEST) program provided services to 347 individuals. Of the 247 claims that were filed, 192 were awarded (77% success rate). Funding for the program was provided by Multnomah County and the Portland Housing Bureau.
- 47 Domestic Violence survivors in transitional housing received employment services and 15 got jobs. 58% of households receiving case management increased their income by program exit.
- 425 youth experiencing homelessness received employment services and 109 secured jobs
- 465 youth experiencing homelessness received education services through the Homeless Youth Continuum. 36 youth earned a GED and 63 youth entered college

In addition, Multnomah County received \$1.3 million in federal stimulus funds to support the Action for Prosperity Project (AFP), which stabilizes homeless families by resolving their immediate basic needs and preparing them for higher-level employment training and employment. In close partnership with WorkSystems Inc., the program offers eligible households access to literacy and job skills development, occupational training and job placements. In FY 2009-10, 287 participants were served through the program, receiving housing and increased income through benefits acquisition and employment. The program was so successful that Multnomah County has continued the partnership with local funding.

**CoC/New CoC Resources:**

Identify new federal resources obtained from the Homeless SuperNOFA.

One new grant was awarded to the Portland/Gresham/Multnomah Continuum of Care (OR-501) through the 2010 Continuum of Care NOFA. Note that due to delays in HUD issuance of award announcements and performance grant agreements, grant agreements and activities associated with these grants will not begin until after June 2011. A description of the new grant award follows:

**Women's Housing Collaborative:** Salvation Army's Female Emergency Shelter (SAFES) and West Women's and Children's Shelter (the West) will yearly provide permanent supportive housing for up to 30 chronically homeless single women or single female-headed families, including households fleeing domestic violence, through \$539,104 in SHP scattered-site leasing and supportive service funds over two years. Women will be referred from SAFES and the West, who each serve hundreds of eligible women annually (and turn away hundreds more for lack of funded capacity). Staff and volunteers at SAFES and the West are already experts in serving women in trauma with the ultimate goal of housing stability and will leverage housing placement and retention staffing supplemented by new community-based mental health case management capacity in an Assertive Community Treatment model with a gender responsive approach. Placement will be responsive to women's transportation, service, and safety needs, and retention efforts will focus on community integration and empowering women to access resources they might need.

In addition to these two new projects, the Continuum of Care received an additional \$9,791,491 in SHP and Shelter Plus Care one-year renewals for 2010-2011.

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**Addressing the Special Needs of Persons Who Are Homeless and who are not Homeless and/or who need Accessible Units:**

In addition to developing new supportive housing for people with special needs, PHB provided funding to programs in order to preserve the existing supply of supportive housing through rehab and maintenance. The City of Portland provided assistance in obtaining/maintaining housing through its Continuum of Care partners. PHB funded rent assistance, and supportive services. See the Fair Housing section for more information.

**Other Non-Homeless People With Special Needs**

The myriad housing and service needs of most categories of non-homeless people with special needs were the focus of a multi-jurisdictional planning effort under the auspices of the Analysis of Impediments to Fair Housing Committee. Housing programs serving people with disabilities and other people with special needs are described on the previous section. See the Fair Housing section for more information.

<b>Special Needs Population Listed in the Consolidated Plan 2005-2011</b>	<b>Progress</b>
Low-income Elderly	No preference was given in City NOFA to projects serving this population. The continuing State budget cuts threaten services and housing for this population.
Adults with Physical Disabilities	The City's NOFA included a preference for permanent supportive housing. Adults with physical disabilities may qualify for permanent supportive housing. Both the Ten-Year Plan to End Homelessness and the recommendations issued by the Analysis of Impediments to Fair Housing Committee address the needs of this group. The continuing State budget woes threaten income programs, services and housing for this population.
Adults with Severe and Persistent Mental Illness	The City's NOFA included a preference for permanent supportive housing. Adults with severe and persistent mental illness may qualify for permanent supportive housing. Both the Analysis of Impediments to Fair Housing Committee and the Ten-Year Plan to End Homelessness address the needs of this group. The continuing State budget woes threaten income programs, services and housing for this population.
Adults with Developmental Disabilities	The City's NOFA included a preference for permanent supportive housing. Adults with developmental disabilities may qualify for permanent supportive housing. Both the Ten-Year Plan to End Homelessness and the recommendations issued by the Analysis of Impediments to Fair Housing Committee address the needs of this group. The continuing State budget woes threaten income programs, services and housing for this population.
Adults with Addiction Disorders	The City's NOFA included a preference for permanent supportive housing. Adults with addiction disorders may qualify for permanent supportive housing. Both the Ten-Year Plan to End Homelessness and the recommendations issued by the Analysis of Impediments to Fair Housing Committee address the needs of this group. The continuing State budget woes threaten income programs, services and housing for this population.
At-Risk Youth	The Ten-Year Plan to End Homelessness addresses some of the needs of this group.
Offenders	The City's NOFA included a preference for permanent supportive housing. Members of this population who have physical disabilities, development disabilities, SPMI, or addiction disorders may qualify for permanent supportive housing. Both the Ten-Year Plan to End Homelessness and the recommendations issued by the Analysis of Impediments to Fair Housing Committee address the needs of this group. The continuing State budget woes threaten income, programs, services and housing for this population.

## **Other Actions**

### **Addressing Obstacles to Meeting Under-served Needs**

#### **Urban Renewal Districts**

Decreasing federal and local subsidies for housing development and assistance continued to be the primary obstacles to meeting under-served needs in the community. For this reason, beginning in FY 2006-07, Portland City Council has required that a portion of all tax increment funds in the following urban renewal districts be set aside for affordable housing: the River District, the Lloyd District, the Lents Neighborhood, Interstate, Inner Northeast (Convention Center/MLK), the South Park Blocks, Downtown Waterfront, Central Eastside, Gateway, and the South Waterfront. Future districts will also be subject to the set aside requirement. The average set-aside is close to 30% of the increment generated. During FY 2010-11, these funds were administered jointly by the Portland Housing Bureau and the Portland Development Commission, and invested within the urban renewal districts for the development of affordable rental and owner-occupied housing and public facilities serving people experiencing homelessness.

### **Fostering and Maintaining Affordable Housing**

#### **Preservation**

The City of Portland's Preservation Ordinance passed in 1998 requires owners of buildings subject to expiring Section 8 contracts to notify the City if they do not intend to renew the contract, and gives the City an opportunity to purchase the properties. During the 2008 program year, the city applied for and was granted a CDBG Section 108 loan pool with the intent to focus the resources on Expiring section 8 properties.

The City financed the preservation of the following expiring use properties in 2010-11:

Please see page 94 for complete information on preservation.

The city has participated in elevating the preservation issue at both the state and national level. Portland continued to play a role in implementing the MacArthur Foundation Preservation grant to Oregon. Portland Housing Bureau staff participated in state-wide preservation working and policy groups. Additionally, Portland hosted a regional conference on preservation sponsored by the National Housing Conference and the MacArthur Foundation, featuring Carol Galante, the HUD Deputy Assistant Secretary for Multi-Family Housing, as well as other national and regional leaders in preservation.

#### **Anti-displacement and Section 104(d) One-for-One Replacement**

The Portland Housing Bureau took the following steps to minimize the displacement of individuals or households resulting from the use of federal funds. The City of Gresham and Multnomah County's CDBG funding did not result in the displacement of individuals or households or in the elimination of affordable housing units.

#### **Mark O Hatfield Building**

This project was awarded CDBG and loan closing is projected for November 2011. The scope of work involves the exterior of the building and no permanent or temporary relocation is anticipated. Should unforeseen circumstances arise which necessitate the need for short term relocation or leaving a unit for any given time during the day, a

reasonable, approved budget is in place. General Information Notices have been given to and acknowledged by all residents and a relocation plan was submitted at the time the application in an effort to minimize any inconvenience and displacement of tenants. Central City is prepared to provide Notices of Non-Displacement upon the legal commitment of funding, which in this case will be at loan closing.

### **Briarwood East**

This project was ultimately awarded HOME funds, Section 108 and a special purpose EDI grant. A Voluntary Arms Length Agreement containing required documentation of the market value of the property and General Information Notices had been received in a timely manner along with the relocation plan which minimized the impact to tenants of the federally funded activity. No tenants were permanently or temporarily relocated.

### **Los Jardines**

This project was awarded Section 108 Funds, however, has not yet gone to loan closing. There is no acquisition and no temporary or permanent displacement is anticipated. An approved relocation budget is in place in the unlikely event a tenant(s) will need to be out of their unit temporarily. General Information Notices have been given to and acknowledged by all residents. Hacienda CDC is prepared to provide Notices of Non-Displacement upon the legal commitment of funding, which in this case will be at loan closing.

### **Otesha Place**

Sabin CDC, the non-profit developer for this project was awarded CDBG funds in the 2010 NOFA and is anticipated to go to loan closing by the end of September, 2011. There will be no funding of acquisition. No permanent displacement or temporary relocation is anticipated as the scope of work will be limited to minor siding repairs to the exterior. Should unforeseen circumstances arise which necessitate the need for short term relocation or vacating a unit for the day, an approved budget is in place. General Information Notices have been given to and acknowledged by all residents. Sabin CDC has provided Notices of Non-Displacement.

### **Upshur**

As anticipated in last year's Caper, one tenant was permanently displaced as a result of his income exceeding new limits. All requirements of the URA were met and the tenant was compensated pursuant URA calculations. Remaining tenants were given received Notices of Non-Displacement with information that they may be required to relocate temporarily to another on-site unit. This project is now closed.

**Arbor Glen**

Human Solutions was awarded CDBG-R funds for landscaping and fencing. No temporary or permanent displacement was required. General Information Notices and Notices of Non-Displacement were given to inform tenants of the federally funded project as required by the URA. This project has been closed in IDIS.

**Rosewood**

This project was closed out in IDIS February 2011. Funding was used for interior and exterior work. All tenants were given General Information Notices as required by the URA and new tenants were given move-in/new resident notices. No tenants were relocated either permanently or temporarily in this project.

**Hewitt Place**

Thirty-Eight units were temporarily relocated for periods not exceeding seven days. All tenants were given 30 day notices and were provided updated information throughout the process. Temporary placements were done on a rolling basis as needed and temporary housing was acquired in nearby, hotel lodging as to ensure the ease of getting children to and from school within their regular schedules. Tenants were given meal vouchers as compensation for not having full kitchens.

Six tenants were permanently relocated as their income exceeded Low Income Housing Tax Credit requirements. These tenants all received timely URA required notices, relocation consultation services, moving assistance and were relocated to comparable units in the nearby area. This CDBG-R Project is now closed in IDIS.

**Sawash Housing-3 projects**

The most recent infusion of federal funding was for work performed to the exterior of the building. General Information Notices were given in a timely manner; however, no tenants were required to move temporarily or permanently. Move-in Notices are being given until closed out in IDIS.

**Taggart Manor**

This is a CDBG-R project which did not require any permanent or temporary relocation. A combined General Information Notice/Notice of Non-Displacement was given at the time of application to all residents and new resident/move-in notices will be given as necessary to incoming tenants until the project is closed in IDIS.

**PCRI Scattered Sites**

There are four addresses associated with this CDBG-R Project. Two of the sites (North Drummond and North Woolsey) were vacant at the time of application through rehabilitation, therefore no GINs were required. The tenants who are residents at North Alberta and North Mason were provided with GINs and Notices of Non-displacement. No tenants were permanently or temporarily relocated for these projects. Move-in Notices are being given until IDIS closeout.

**Uptown Tower**

Uptown Tower is a Section 8 project that received Section 108 funds to do a major construction rehab. All tenants were provided GINs at the time of application and were given Notices of Non-displacement at the time of funding. In an effort to minimize disruption to tenants, temporary relocation was done in stages and tenants were offered temporary housing at a nearby motel located one block away which offered off-street free parking. These units provided the convenience of private kitchens which also held down the cost of relocation expenses the project had to pay out. No tenants were permanently displaced. As Section 108 funds do not have the same IDIS closeout procedures as other federally funded projects, move-in/new residence notices will be given until project completion.

**Halsey Project**

This Section 108 project was a facility which involved acquisition with federal funds and was rehabilitated with City funding sources. One business tenant occupant was given a GIN and a Voluntary Sales/Arms Length Transaction Agreement was obtained from the seller.

**Villa de Sueños**

This project was funded with Section 108 and HOME funds. A consultant, Right of Way Associates, managed the relocation process, providing tenants with General Information Notices at application and followed-up with Notices of Non-Displacement at the time loan closing. Tenants were temporarily relocated in phases. With one exception everyone stayed in the project. One tenant, who liked the location of her temporary placement, decided not to return. Move-in Notices will be issued until IDIS close-out.

## **Removing Barriers to Affordable Housing**

### **Housing Connections**

Housing Connections addresses barriers to locating appropriate affordable housing. Before Housing Connections was implemented, there was not a centralized information source for available, affordable housing. Low-income renters had to call multiple agencies and property management companies to find out if there were affordable units available. This was an arduous process for people who were experiencing a housing crisis or who had special needs. Often people would accept housing that did not meet their needs because the search for appropriate housing was too difficult, which can lead to future housing instability. Throughout FY 2010-2011, Housing Connections continued to assist people to find units that met their needs, including properties that accept Section 8 vouchers, properties that will waive standard rental criteria for tenant education program graduates, and properties that offer accessible units, as well as accessible features for tenants with special needs.

### **Siting Issues**

To address barriers to affordable housing, the City continued to support a position with the Office of Neighborhood Involvement (ONI) that facilitates the siting of new affordable housing, helps to negotiate “good neighbor” agreements, and assists in processing any disputes that may arise between an affordable housing development and its neighbors.

## **Overcoming Gaps in the Institutional Structures and Enhancing Coordination**

### **County-Wide Federal Funding Oversight Committee (FFOC)**

The FFOC is an inter-jurisdictional committee made up of 6 public members, two appointed by each jurisdiction in the Consortium. In making appointments, jurisdictions are encouraged to take into account the income, racial, ethnic and cultural diversity of the jurisdiction. FFOC members are expected to provide a balanced, citizen-based perspective on the matters delegated to it. The role of the FFOC shall be to hold public hearings as required by the Consolidated Plan process, recommend the allocation of federal housing and community development formula funds to the jurisdictions in the Consortium, and recommend the allocation of federal funds to address homelessness pursuant to the Continuum of Care to the jurisdictions in the Consortium.

### **Gresham Community Development and Housing Subcommittee**

The City of Gresham Community Development and Housing Subcommittee (CDHS) is a volunteer citizen advisory committee that has primary responsibility for citizen participation, and provides guidance to the Gresham City Council on policy related to community development and housing for low, very low and extremely low income persons. The CDHS also participates in establishing the criteria for competitive RFP processes, and recommends projects to be funded with federal CDBG/HOME funds.

The CDHS consists of seven to eleven members, appointed by the Mayor with the approval of the Council. The City of Gresham strives to recruit - members representing a broad spectrum of the population including -low income residents, residents of pre-qualified areas, minorities, and persons associated with neighborhood organizations, agencies, religious organizations, and persons affiliated with the industrial, real estate or financial sectors.- Members serve for staggered three-year terms.

### **Coordinating Committee to End Homelessness (CCEH)**

The Coordinating Committee to End Homelessness (CCEH) is the lead entity for ongoing community planning for *Home Again: a 10-year plan to end homelessness in Portland and Multnomah County*. The committee provides broad-based feedback on implementation issues. It also is charged with updating the 10-Year Plan document over time so that it will continue to be a viable tool in a changing environment. CCEH also develops strategies for ending homelessness that are incorporated into the Continuum of Care plan.

### **Policy Advisory Board of Multnomah County**

The Policy Advisory Board (PAB) of Multnomah County is made up of representatives from each of the five participating cities of Fairview, Maywood Park, Troutdale, Wood Village and Lake Oswego. (A small section of Lake Oswego is located in Multnomah County and has been included since program inception). All PAB meetings are open to the public. The PAB establishes the criteria for competitive RFP processes, and recommends projects to be funded with federal housing and community development funds in Multnomah County.

## **Portland Housing Advisory Commission (PHAC)**

PHAC is a volunteer advisory commission made up of 12 people who live or work in Portland. The members are appointed Portland City Council. PHAC advises the Director of the Portland Housing Bureau (PHB), the Housing Commissioner, and the Portland City Council on a range of housing policy and program issues. With respect to federal housing and community development funds, the primary purpose of PHAC shall be to hold hearings on Portland-specific community needs and Portland-specific proposed strategies and activities.



## **Ensuring Compliance with Program and Comprehensive Planning Requirements**

### **Performance measures in homeless programs**

During the FY 2004-05, the Committee of the CCOH continued to push for improved data collection in order to further the effectiveness of performance evaluation. Proposals being considered for funding in the Consolidated Application for Homeless Assistance submitted to HUD were required to demonstrate appropriate performance measures and reasonable success in achieving them in order to be prioritized in the Consolidated Application. In addition, all projects included in the Consolidated Plan must receive certification of compliance with Consolidated Plan goals.

### **Limited Clientele Activities**

PHB contracts with a variety of agencies that provide services to low/moderate income clients who are not presumed by HUD to be low-income. In these situations, contracts between the City and the agency state that the agency will collect income and family size data for each client and that the agency will compare this information to the current low/moderate-income thresholds, as provided by HUD. All client income information is retained by the agency and is reported to PHB in regular progress reports. When PHB monitors agencies, it reviews this income data to verify that at least 51% of the clients served by the program are low/moderate-income and that the data provided in project reports accurately reflects the data in the agency files.

### **Consistency with the Consolidated Plan**

The Consortium has a procedure for processing requests for Certificates of Consistency with the Consolidated Plan. When a request is received, the Public Affairs Program Manager, who functions as the principal author of the Consolidated Plan, reviews the request to assess whether it is consistent with the Consolidated Plan. If the request is consistent, a Certificate of Consistency is completed and signed by the PHB Director, as the head of the Consortium. PHB retains a copy for its file. The completed and executed Certificate is then returned to the applicant.

### **Did Not Hinder by Action or Inaction**

The City of Portland did not any changes in program objectives. It pursued all resources as indicated in the Annual Action Plan. There no inquiries concerning certifications for consistency for other HUD programs. It also did not commit any willful inaction in any circumstance. Overall, it did not hinder the implementation of its Annual Action Plan by action that it under took.

## **Ensuring Compliance with Program and Comprehensive Planning Requirements**

### **Evaluation of use of public funds**

To assess and monitor the allocation, expenditures, and use of public funds spent to develop affordable housing, the Portland Development Commission issues annual reports on housing production by funding source. This report is reviewed by both the Portland Development Commission and the Portland Housing Advisory Commission.

The following list of HUD program applications received certifications of consistency with the FY 2010-2011 Consolidated Plan Action Plan.

**Certification of Consistency: FY 2010-2011**

<b>Applicant Name</b>	<b>Project Name</b>	<b>Name of Federal Program</b>
1. City of Portland	Portland Healthy Homes Program	HUD Healthy Homes Grant
2. Portland, Gresham, and Multnomah County Continuum of Care	Various throughout Multnomah County	HUD McKinney Continuum of Care
3. Housing Authority of Portland	Family Unification Program	HUD FY 2010 Family Unification Program
4. Housing Authority of Portland	Public Housing Family Self-Sufficiency	HUD Public and Indian Housing Family Self-Sufficiency (ROSS) Program
5. Housing Authority of Portland	Housing Choice Voucher Family Self Sufficiency Program	HUD Fiscal Year 2010 Housing Choice Voucher Family Self-Sufficiency

## **Leveraging Resources**

The Consortium leverages HUD funds with a variety of local public as well as private dollars for housing and community development activities. Housing development and rehabilitation activities are highly leveraged because public funds are used as "last in" gap financing amounts. Locally controlled direct subsidy dollars are provided as loans and grants for rental housing.

### **Housing Investment Fund**

In 1996, the City of Portland created the Housing Investment Fund (HIF), allocating \$24.6 million of General Fund dollars for the 1996-98 biennium.

The City of Portland's ordinance # 181701 stated, all program earnings from activities financed through the Fund, unless otherwise committed to other purposes through bond indentures, intergovernmental agreements, or other binding agreements, shall be returned annually to the Fund, to generate an on-going stream to support housing development and homeless services and all expenditures will be approved through the City's annual budget process.

### **Ending Homelessness**

In FY 2010-2011, \$11,117,400 Million in City General Funds and Housing Investment Funds allowed the City to purchase a variety of innovative service to homeless households.

Through a substantial amendment to the Consolidated Plan, regional funding partners chose to use the existing infrastructure of the STRA program as the primary system to deliver HPRP services, allocating \$3,973,668 of the HPRP award to the STRA program for expenditure between 2009 and 2011. The addition of HPRP funding to the STRA program roughly doubled the yearly funding to STRA for fiscal years 2009-10 and 2010-11.

### **Affordable Housing**

FY 2010-2011 saw a \$11,327,737 investment of CDBG, CDBG-R, HOPWA and HOME funds to develop and retain multi-family affordable rental housing opportunities leveraged significant other private and public funding. In FY 2010-2011 an estimated \$64,883,026 in other private, low-income housing tax credit and public funding was committed to affordable housing development for these projects which shows a leverage of \$2.99 of every PHB dollar invested.

In addition, the following are other resources utilized for affordable housing development programs (multi-family or single family homeownership):

- The City of Portland uses (TIF) resources for affordable housing in urban renewal districts (URA), thereby allowing federal housing resources to be used citywide. In FY 2010-2011 approximately \$10,345,815 were committed to affordable housing project throughout URA's in the city of Portland.
- The City of Portland has funded The Non-Profit Operating Support Collaborative with \$586,426 from HOME and CDBG.

- Federal Low Income Housing Tax Credits (LIHTC); State of Oregon Affordable Housing Tax Credits (OAHTC) and resources from the State's Trust Fund are also used for either new construction or rehabilitation of affordable housing. In addition, \$4,054,000 in Section 108 Loan Guarantee funds were committed to affordable housing projects during the year.

### **Economic Opportunity Initiative**

The table below outlines the CDBG funds that were leveraged in FY 2010-11 that support the economic opportunity initiative programs.

<b>Economic Opportunity Initiative Leveraged Funds FY 09/10</b>	
NW Area Foundation	\$310,000
Workforce Investment (WIA training)	\$150,000
State & Federal IDA funds (approx.)	\$60,000
NW Health Foundation	\$90,500
OR Employment Dept. (Child Care Div.)	\$450,000
OR DHR/TANF Benefits extensions (approx.)	\$72,000
United Way	\$100,000
Tax Increment Financing (TIF)	\$18,000
PDC Small Business Loan Guarantee	\$150,000
Penny Foundation Match	\$110,000
<b>Total</b>	<b>\$1,510,500</b>

## **Self-Evaluation**

HUD requires that the City evaluate its annual accomplishments by comparing planned activities versus actual outcomes, and to evaluate if progress was made toward meeting Consolidated Plan goals. To assist with this evaluation, HUD has suggested the City should consider the following questions:

### 1. Are activities and strategies making an impact on identified needs?

#### ***Ending Homelessness Initiative***

All of the activities funded with HUD and other public resources have made a significant impact during the report period, for example:

The City's campaign to end the institution of homelessness has adopted these measures of success:

- increase in the number of units of permanent supportive housing;
- increase in the percentage of housing developed for households with incomes at 0-30% MFI;
- increase in systematic linkages for housing and services;
- improvement in tracking systems;
- increase in number of homeless households placed in housing;
- increase in retention rates for formerly homeless people in housing.

### 2. What Indicators that best describe results?

For the ending homelessness program area, indicators that show permanent housing placement, retention in housing, prevention of homelessness, and other factors that show that people become stabilized after homelessness (either chronic or short-term) would be best.

### 3. Are major goals on target?

Yes, Ending Homelessness programs are on schedule, budget and all disbursements are timely. The systems integration work already completed throughout the ending homelessness program area, allowed us to rapidly deliver the large infusion of Homelessness and Rapid Re-housing Program (HRRP) stimulus funds to community members through existing program infrastructure that effectively targets those most in need. We have expended nearly all of the full three-year award.

### 4. What are the barriers that have a negative impact on fulfilling the strategies and overall vision?

Federal funding levels and national trends. For example, our current recession and corresponding increased unemployment is affecting our success at ending people's homelessness.

### 5. What adjustments or improvements to strategies and activities might meet community needs more effectively?

Our community is making adjustments and improvements to strategies in response to changing trends. For example, a community-wide strategic planning group, the Coordinating Committee to End Homelessness, develops annual goals and outcomes that are reported on a quarterly basis. The Portland Housing Bureau publishes "Report Cards" on its website at regular intervals.

Click here for the 2010 Annual Report of the 10-Year Plan for Portland/Multnomah County: <http://www.portlandonline.com/phb/index.cfm?c=38062>

## ***The Economic Opportunity Campaign***

### 1. Area activities and strategies making an impact on identified needs?

This year the EOI had its third, three year graduating class. The recession had a serious impact on EOI progress but considering that the unemployment rate for low income people is much higher than the population in general (overall OR is 10.7 %, estimates put low income folks at close to 30%) EOI projects were quite successful.

### 2. What Indicators best describe results?

We set higher performance standards than HUD. EOI met 100% of its service goals for 09/10 and the workforce projects did amazingly well by accomplishing 82% of their outcome goals for a 25% income increase for this year's graduating class. Most successful workforce graduates started unemployed, received training and support, gained employment and then increased their wages by an average of 30% by graduation. Not bad for the worst recession in 60 years.

Small businesses are having a much rougher time of it. Preliminary information indicates that EOI Microenterprise projects only met 60% of their goals with this year's graduating class. Due to the recession, we are adding an additional reporting item of "stayed in business but did not meet the 25% revenue increase goal". That would bring our success rate up to 80%.

### 3. Are major goals on target?

Workforce is satisfyingly close to program targets. We are reviewing all aspects of the Microenterprise program to find ways to improve outcomes. The recession has thrown both aspects of the program off but particularly microenterprise. This makes some sense due to workforce projects staff's greater ability to protect their clients and their jobs with employers. Microenterprise project staff cannot get American consumers to change current low spending patterns.

### 4. What are the barriers that have a negative impact on fulfilling the strategies and overall vision?

Our 32 projects report that the most difficult barriers are:

1. Over all condition of the economy
2. Ex-offender hiring barriers
3. Inability to participate in training due to need to work during training hours
4. Addiction challenges
5. Declining leverage from other government & private sources secured by their agencies.
6. Reduction in EOI General Fund support for 10/11. City Council cut all our one time only funds. This was administered as cuts in allocation based on the size of the project. Projects with the highest funding were cut 16%, medium were cut 10% and small projects were cut 3%. Two poorly performing projects were eliminated for 10/11.

EOI operating costs increase with the move to PDC. Funds used in the past for project training and technical assistance now have to go for overhead.

5. What adjustments or improvements to strategies and activities might meet community needs more effectively?

As noted above, we are reviewing the Microenterprise projects to find ways to improve. One change endorsed by all of the seven Microenterprise Projects was to change their eligibility criteria. Beginning in 10/11, 50% of EOI Microenterprise participants can be 50-80% of MFI and the other half must continue to be 0-50% MFI. This correlates with the State's elimination of any Microenterprise funding in Portland (they focused on 50-80% MFI).

All workforce participants will continue to be 50% MFI or below.

***Campaign to increase the range of housing opportunities for low-income people***

There are three different areas of Affordable Housing:

1. Rental Housing Development production goals established in the city's 10 year Plan to End Homelessness are the best evaluation tool. PHB has a 10 year production goal of 1200 rehabbed or new construction PSH units by the year 2015.

The city is in the 7<sup>th</sup> year of the 10 Year Plan to End Homelessness. The plan has two housing production goals:

- Develop 1200 PSH units via new construction or acquisition/rehab
- Create 1000 PSH units via reprogramming existing units through rent and operating subsidies

The city has met 64% (1392/2200) of the established housing production goal.

In June 2004, the Home Ownership Advisory Committee (HOAC) adopted a goal to "Close the minority homeownership gap in Portland by June 2015". Using the 1990 and 2000 Census data, and applying assumptions about population growth for Portland, to achieve this 10-year goal, it was determined that 13,985 total new minority homeowners would be needed. These goals were adopted by Operation HOME and remain the milestone for PHB's Homeownership Program.

2. Based upon our current national housing crisis, the PHB has modified the outcomes of its Homeownership Program by focusing on mortgage readiness. The PHB and subrecipients continue to tracking the number of new homeowners, but now place increased emphasis on the number of persons participating in mortgage preparedness activities such as: attending home buying fairs, enrolling in homebuyer orientations, taking financial fitness and homebuyer education classes, participating in homebuyer counseling sessions and starting IDA's (Individual Development Accounts where participants savings are matched 3 to 1.)

As the national housing/foreclosure crisis affects Portland, PHB staff focused attention on foreclosure prevention classes provided by Homeownership Program subrecipients as well as provided funds to local on-profits for foreclosure prevention activities.

3. Access and Stabilization programs promote long-term housing stability by providing a continuum of services that assist individuals and families. The best indicator to measure the efficacy of these programs remains the on-going individual program assessment completed by PHB contract managers and the sub-recipient's key staff.

1. Area activities and strategies making an impact on identified needs?

Evaluation of each program is performed consistently and continually across all Affordable Housing programs. Sub-recipients submit status reports with invoices and documentation for billing purposes. PHB Housing Team staff review the reports and activities in order to assess a program's performance in relation to its stated goal. Based upon the assessment, PHB is able to provide strategic technical assistance to modify activities that will allow performance goals to remain on target and be met.

Currently, it is determined that the Rental Housing Development, Access and Stabilization programs are surpassing established and individual goals. With the recent housing crisis, it is too difficult to evaluate the Homeownership program with respect to the June 2004 Home Ownership Advisory Committee (HOAC) adopted goal. Individual Homeownership programs have all met projected goals to date.

2. What Indicators that best describe results?

PHB has found the following indicators are most useful for illustrating results with regard to Affordable Housing:

- Rental housing unit production
- Homeless Street count results
- Foreclosure rate
- New minority homeowners tally
- Numbers of minorities "mortgage-ready"

3. Are major goals on target?

As previously stated, the Rental Housing Development production goals have surpassed the established city 10 year Plan to End Homelessness goal. PHB is in the middle of the 5<sup>th</sup> year of the 10 year plan and has met 64% (11392/2200) of the established housing production goal.

Individual Access and Stabilization are individually evaluated and all are meeting performance objectives set at the time of contracting.

With re: to the Homeownership Programs, individual sub-recipient contracts have each met their program goals and objectives. However, the recent housing crisis does not allow us to evaluate the overall Homeownership Program with respect to the June 2004 Home Ownership Advisory Committee (HOAC) adopted goal. However,

4. What are the barriers that have a negative impact on fulfilling the strategies and overall vision?

PHB has determined the following barriers:

- National housing and economic crisis;
- an increase in development costs;
- federal and local funding shortfalls;
- the Portland/Multnomah County housing market conditions;



- limited flexibility with Federal funds.

5. What adjustments or improvements to strategies and activities might meet community needs more effectively?

PHB has identified the following adjustments as able to aid the strategies to meet community needs:

- Increased federal and local funding;
- Unwavering political support;
- Development of a consistent housing policy as we transition to the PHB;
- Increased collaboration amongst affordable housing funding/development entities.

## **Monitoring**

The Consortium is responsible for the overall administration of the Consolidated Plan and the monitoring and evaluation of CDBG and HOME program activities as well as the HOPWA and ESG programs.

### Regulatory Framework

The CDBG regulations (24CFR 570.501 (b)) state that:

“[the grantee] is responsible for ensuring that CDBG, HOME, HOPWA and ESG funds are used in accordance with all program requirements. The use of ...sub-recipients...does not relieve the recipient of this responsibility. The recipient is also responsible for determining the adequacy of performance under sub-recipient agreements...and for taking appropriate action when performance problems arise...”

The language in Subpart J of 24 CFR Part 85 “Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments,” which applies to HUD grants including CDBG, HOPWA, ESG and HOME, is even more explicit about the obligation to monitor sub-grant supported units including city programs and sub-recipients:

“Grantees are responsible for managing the day-to-day operation of grant and sub-grant supported activities to assure compliance with applicable Federal requirements and that performance goals are being met. Grantee monitoring must cover each program, function, or activity.”

### Monitoring Objectives:

- Ensure that grant funded activities comply with federal regulations governing administrative, financial, and programmatic operations;
- Ensure that, to the extent feasible, performance objectives are met within budget and on schedule; and,
- Ensure that City staff operates their programs in accordance with established program policies.

## **Monitoring & Evaluation Program**

The Consortium provides oversight and technical assistance to grantees as needed in assessments and monitoring visits. Contracts with each of the sub-recipients/grantee specify that they will:

1. Assure and certify that the Bureau complies with federal regulations, policies, guidelines, and requirements with respect to the acceptance and use of CDBG, HOME, HOPWA and ESG funds as specified by HUD;
2. Prior to incurring costs, ensure that each project has had an environmental review and, where appropriate with respect to construction projects, that Davis Bacon, Section 3, and (MWESB) requirements are met;
3. Prepare a program plan and budget as required and submit the plan or contract to the Consortium so eligibility can be determined;
4. Provide annual data to ensure that the appropriate national objective is met; and,

5. Meet financial requirements by ensuring all costs are documented and supported with proper documentation.

The Consortium staff provides oversight of the operating departments' accountability and systems and procedures for monitoring or evaluating grant-funded programs. Consortium administration staff assists department staff to develop monitoring checklists and other tools so that they are able to assess compliance with federal requirements including eligibility and benefit to low- and moderate-income persons. When scheduled, staff participates in on-site monitoring activities. Oversight activities include:

1. Review of the risk analysis and criteria used to determine what agencies and projects are selected for on-site monitoring or a full assessment.
2. Review of project files to determine that they include appropriate documentation of project oversight through desk monitoring, documentation of on-going contact (telephone or on-site) between the project specialist and the implementing agency, as well as identified problems and solutions.
3. Review of annual monitoring results and three-year in depth formal assessment performed by program staff.

### **Tier I**

Tier I tasks are directed to ensure that the operating departments are meeting their obligations with respect to program implemented directly by City staff. To do so, City staff performs three tasks:

1. Monitor activities implemented by City staff.
2. Work with each operating department to help establish and/or evaluate the system of monitoring and assessment of sub-recipients and other entities including on-site assessment and desk monitoring procedures.
3. Provide up-front technical assistance on eligible activities and other regulatory matters.

### **Tier II**

Tier II tasks are directed to sub-recipients and other entities. Staff in operating departments performs these tasks. City staff consults on the operating departments' monitoring or evaluation systems and procedures for grant funded programs. When possible, City staff participates in on-site monitoring activities.

**SUBRECIPIENT MONITORING**

**FY 2010/2011**

	FY 10-11		
	Active Contract(s)?	Fiscal	Program
1st Presbyterian	X		
211 Info	X		
AAAH	X		
APICIA	X		
BOLI / State of Oregon	X		
Caritas			
Cascade AIDS	X		
Cascadia	X	3/8/11	3/8/11
Central City Concern	X		
Clark County	X		
Community Alliance of Tenants	X		
Community Energy Project	X		
Community Housing Resource Center			
Community Partners for Affordable Housing (CPAH)			
Dignity Village			
Ecumenical Ministries of Oregon	X		
Fair Housing Council	X	6/1/11	6/1/11
Gresham (HOME)	X		
Habitat For Humanity	X		
Hacienda	X		
HOST	X		
Housing Authority of Portland	X	Pending	Pending
Housing Development Center	X		
Human Solutions	X		
Impact NW	X		
Innovative Housing	X		
IRCO	X		
JOIN	X	5/17/11	5/17/11
Legal Aid Services Oregon (LASO)	X		
Latino Network			
Macdonald Center			
Multnomah County	X		
NAYA	X	5/12/11	5/12/11
New Avenues for Youth	X		
Northeast Workforce Center			
Northwest Housing Alternatives	X		
Northwest Pilot Project	X	6/15/11	6/15/11
Oregon Community Warehouse	X	5/26/11	5/26/11
Outside In	X		
PCRI	X	5/10/11	5/10/11

<b>PDC</b>	X		
<b>Piedmont Comm Dev</b>			
<b>Portland Business Alliance</b>	X		
<b>Portland Housing Center</b>	X	5/20/11	5/20/11
<b>Proud Ground</b>	X		
<b>REACH</b>	X		
<b>Rebuilding Together</b>	X	Pending	Pending
<b>Red Cross</b>	X		
<b>ROSE</b>	X		
<b>Sabin</b>			
<b>Salvation Army</b>	X		
<b>SE Works</b>			
<b>Street Roots</b>	X		
<b>Transitions Projects Inc</b>	X		
<b>Unlimited Choices</b>	X		
<b>Worksystems, Inc</b>			

## **Evaluating and Reducing Lead-Based Paint Hazards**

The City of Portland implements the requirements of the Residential Lead-Based Paint Reduction Act of 1992 under the guidelines of HUD's proposed rule, Requirements Notification, Evaluation, and Reduction of Lead-Based Paint Hazards in Federally Owned Residential Property and Housing Receiving Federal Assistance (24 CDR 35, 36, and 37). For all CDBG, HOME, and HOPWA funded activities administered by PHB, contractors were required to provide notification of the hazards of lead-based paint and use lead-safe work practices.

The City of Gresham also implemented its CDBG and HOME programs in compliance with the relevant federal regulations. None of the programs or projects funded by Gresham provided in excess of \$5,000 in rehab assistance. Notification and visual inspection requirements were followed for Gresham's homeownership programs. The City of Gresham participated in regional efforts to provide lead-based paint training for contractors and other efforts to develop the number and expertise of contractors with various levels of certification pertaining to lead-based paint.

Multnomah County complies with federal regulations and continues to work towards increasing small Lead Based Paint contractors through building their capacity through education and safe work practices.

The Portland Development Commission assists with the implementation of federal lead-based paint requirements for the administration of CDBG and HOME funds. For all multi-family affordable housing funded through the Portland Development Commission, it ensures property compliance with the regulations, providing risk assessments and clearance tests where necessary. For single family rehab activities performed by PHB sub-recipients, PDC staff conducts clearance tests on properties whose scope of work disturbs above the *de minimis* threshold.

The City of Portland has successfully administered three HUD Lead Hazard Reduction Grants, providing over \$12 million dollars in lead hazard reduction assistance to over 1000 low-income households (protecting over 1,200 children from lead poisoning) since 1998. Most recently, Portland was awarded an additional \$4 million dollars in September 2009 that will provide lead hazard reduction for 375 homes through December 2012 located within the city of Portland, Gresham, and Multnomah County.

## **Status of Grant Programs**

In addition to monitoring program performance, the Consortium has been monitoring the status of federal grant funds to ensure timely expenditure. Overall, all grants are moving forward as anticipated.

For FY 2010, all projects and activities are currently on schedule.

Are grant distributions timely?

No major delays in distribution of funds have been encountered.

## **End Homelessness**

PHB funds allocated for homeless services support the community's Continuum of Care for homeless adults and youth as well as the City and County 10-year Plan to End Homelessness. Program activities focus primarily on the development and operations of homeless facilities along with providing associated services to each of three homeless populations: adults, unaccompanied youth, and those with serious mental illness. The City of Portland leads planning, coordinating and funding services for homeless adults and the majority of Portland's CDBG funding for homeless programs is targeted towards homeless adults. Funds for services for homeless youth are contracted through Multnomah County. In this way, CDBG dollars are used to leverage other sources of County funding for homeless youth services.