

Portland Housing Bureau

Community Development Service Area

Nick Fish, Commissioner-in-Charge

Traci Manning, Director

Bureau Summary

BUREAU MISSION

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

- Building and preserving affordable housing
- Supporting programs that help low-income Portlanders find, rent, buy, retain, and repair their homes
- Bringing together our partners and leading them as we assess the city's housing needs, choose the best solutions to efficiently meet them, and identify how to pay for them
- Reaching out to racially and culturally diverse groups to ensure their participation in the economic opportunities our housing investments create

BUREAU OVERVIEW

PHB stewards several sources of public funds for investments in affordable housing. Program investments cross a continuum from resources aimed at ending homelessness to rental housing for low-income individuals and families to targeted homeownership and home retention programs. Funds come from three major sources: tax increment financing (TIF) under City policy that directs 30% of all TIF expenditures to affordable housing; City General Fund; and federal funds. The latter come from the U.S. Department of Housing and Urban Development (HUD) in the form of both entitlement grants (mostly Community Development Block Grant and HOME) and competitive grant funds. PHB strategically deploys these sources of funds in alignment with the Strategic Plan for loans and grants for capital construction of new or rehabilitated housing or for sub-recipient contracts to non-profits to deliver safety net services to Portlanders in poverty.

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

PHB is advised by the Portland Housing Advisory Commission (PHAC). This commission is intended to provide advice both to PHB and to City Council on strategic priorities, alignment opportunities, and trade-offs inherent in the expenditure of public funds. PHAC provides advice on strategic directions and does not have an explicit decision-making role. However, PHAC has helped shape the new PHB Strategic Plan, and also serves as the bureau's budget advisory committee (BAC).

Equity is woven throughout PHB policy and operations. The equity agenda recognizes and responds to the historic and institutional barriers to housing, homeownership, and economic stability experienced by communities of color. PHB seeks to place a greater reliance on community-validated data (such as the

Coalition of Communities of Color report) to understand unmet needs, and to intentionally hold its partners accountable for removing barriers and serving members of minority communities equitably.

STRATEGIC DIRECTION

PHB adopted a three-year Strategic Plan. The strategic plan establishes four core goals for PHB to focus on over the next three years:

- Meet Portland's need for quality affordable homes for its residents.
- Ensure equitable access to housing.
- Develop, leverage, and allocate housing funds to meet needs, sustain assets, and strengthen the housing industry.
- Build a strong, dynamic Housing Bureau that provides the highest level of leadership and service to customers, stakeholders, employees, and the community.

A current version of PHB's strategic framework, which sets out the goals, sub-goals, and strategies that PHB will undertake over the next three years can be found on the bureau's website.

Through its strategic planning work, PHB has adopted four priorities for its investments. The bureau's budget is aligned with these priorities:

- **Priority One:** Provide more rental housing for the most vulnerable families.
- **Priority Two:** Move people quickly from homelessness to permanent housing while preventing families on the brink from losing their homes.
- **Priority Three:** Help Portlanders from communities of color buy a home or keep the home they already own.
- **Priority Four:** Provide a safety net that includes shelters and other short-term help for low-income Portlanders who are homeless or at risk of homelessness.

PHB's Vision

PHB's vision is as follows:

- All Portlanders can find affordable homes in healthy neighborhoods with strong schools, good parks and recreation, healthy natural areas, safe streets, and quality food stores.
- All Portlanders have equitable access to housing and to the opportunities that safe, stable housing can deliver, free from discrimination.

Values

PHB upholds the following values:

- **Equity:** PHB is committed to social justice in the delivery of housing to all residents of Portland's diverse communities. PHB embraces diversity in its workforce and culture.
- **Stewardship:** PHB invests, leverages, and prioritizes spending in ways that provide the highest public value and have the greatest influence on critical housing needs.
- **Transparency:** PHB builds long-term trust by operating with integrity, inviting broad public involvement, and following processes that are clear, open, and without bias.
- **Innovation:** PHB believes new thinking, partners, and ideas will help build an effective organization and resolve long-standing problems.

Service Improvement Plan

In FY 2012-13, PHB will continue implementation of the Strategic Plan, which prioritizes these as the top three areas for service improvement:

1. Review and update lending and asset management guidelines. Together with its housing industry partners, PHB is undertaking a careful examination of the process, guidelines and products it uses to underwrite housing projects and manage existing community housing assets for long-term viability. This initiative will improve transparency and service to customers, ensure that investments balance policy objectives against prudent fiscal practices, and maintain a healthy and sustainable portfolio that will serve generations of Portlanders. PHB has completed a good portion of the work in this area and intends to continue progress into FY 12-13. Success of the lending and asset management guidelines initiative will be measured by the financial health of the portfolio and by a survey of borrowers to measure customer service improvement. This initiative will be completed by June 30, 2013.
2. Implement a comprehensive, integrated PHB business and data system. PHB has procured and is in the process of implementing Housing Development Software (HDS). HDS will upgrade and unify the existing systems through which bureau originates and services housing loans, conducts assess management and compliance functions, and produces and analyzes investments and programmatic outcome data. Successful implementation of HDS is critical to providing timely and accurate information internally and externally to borrowers, community contractors, regulators, auditors, and the public. HDS will improve customer service to borrowers and contractors, enhance PHB's ability to analyze the impact of its programs and investments and provide for effective portfolio and asset management.

HDS implementation has begun with end-user training, fit-gap analysis, project plan development and on-site initiation of the Loan Servicing and Funds Management modules. PHB will hold its first HDS Stakeholder Group Meeting in February of 2012.

Success of HDS will be measured by customer service surveys and by the level of improvement to – and expansion of – PHB's online production report and dashboard. Implementation will be completed by June 30, 2012.

3. This year, PHB will set clear, measurable targets for utilization of all PHB-supported programs by subpopulations. PHB will also set measurable targets for contractor and sub-contractor participation. The bureau is currently developing strategies to set and achieve performance targets in the upcoming year with its Equity and Diversity Council, the PHAC, and community partners. The achievement of this goal will be measured by comparing utilization and participation data over FY 2011-12 to established baseline data. The results of the baseline data, targets, and each year's results are published and tracked in the bureau's production report. The distinct phases of this service improvement plan will be completed by December of 2012 and include: establish baseline data, set targets, implement contractual and policy changes, measure and report, and refine.

SUMMARY OF BUDGET DECISIONS

PHB Budget Structure

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

Budget Direction

The bureau has engaged the PHAC to take on the role of budget advisory committee during the budget process. This citizen committee reviewed PHB financial, programmatic and strategic plan details, took public testimony, and provided recommendations concerning direction and priorities.

Additionally, OMF directed bureaus to participate in two program ranking exercises in an effort to guide budget decisions. The program rankings were developed by the PHAC, and the Core ranking was finalized by the PHB Executive Team, following input from PHB's Management Team.

PHB operates nearly all of its programs in contract with community partners. PHB contract managers had numerous conversations with contractors to help identify cuts with the least impact on the public being served.

Lastly, PHB conducted an intensive staff involvement component to the budget process. Representatives from each of the program areas and in different levels of the organization came together for a series of meetings to discuss and recommend budget reduction options. The recommendations stemmed from an employee budget input process comprised of team meetings and an anonymous staff survey. Many of the staff recommendations were implemented in the Requested Budget, and they offset approximately \$200,000 in budget reductions that the bureau was facing.

Federal Funds

PHB received reduced allocations from HUD for federal funds: CDBG was reduced by 15% (\$1,103,089) and HOME was reduced by 28% (\$1,312,075). PHB's Requested Budget reflects cuts in each of these funds achieved through programmatic reductions based on PHB Strategic plan priorities.

Decision Packages

The Requested Budget includes reductions of \$500,000 and add packages totaling \$4,775,300.

Ending Homelessness and Related Programs

- **Prevention and Rapid Re-Housing** - Short-term rent assistance is a highly effective tool to prevent eviction, keep people housed, and to rapidly end homelessness for most families or individuals. A \$1.9 million one-time General Fund package continues funding to support cost effective, long-standing programs.
- **Housing Access Services** - This \$456,300 one-time General Fund package continues historical General Fund one-time funding for programs providing information and referral, advocacy and case management for low-income renters confronting homelessness, eviction, housing discrimination, and unhealthy housing conditions. PHB's Housing Access and Stabilization programs represent a community-wide safety net that assists individuals and households to obtain and retain housing, including those with rental screening barriers such as poor credit, evictions, and criminal history. These programs continue our commitments to fair housing and are especially critical given the current economic climate and tight local rental housing market.
- **Shelter and Emergency Services** - This package, funded by \$1,734,000 of one-time General Fund, continues long standing one-time General Fund resources for the three types of shelters PHB invests in: year-round, winter, and severe weather. Shelter operations remain a critical component of the safety net for the community, and PHB works closely with Multnomah County, Home Forward (formerly Housing Authority of Portland) and non-profit partners to ensure that investments and outcomes are closely aligned. Collaborative efforts are aimed at helping people in emergency shelters regain permanent housing as quickly as possible. For most individuals and families, the most cost-effective and humane approach is to minimize shelter stays by helping

people link to social, health, and employment services while helping them secure a permanent housing solution through programs like short-term rent assistance.

- **Bud Clark Commons Operating Costs** - The allocation of \$185,000 of one-time General Fund funds a portion of the operating costs. This amount is down from the \$390,000 from FY 11-12. The Bud Clark Commons opened in June 2011. In its first six months of operation, the Day Center served a total of 4,300 people, with an average of 600 daily visitors seeking services and basic needs. Nearly 300 people have found permanent homes through the Day Center since it opened.

Homeownership Programs

Consistent with the PHB strategic plan, this package provides \$500,000 of one-time General Fund to support for homebuyer education and counseling and foreclosure prevention programs. These services are targeted to minority communities, helping them to access new homeownership opportunities and maintain current homeownership, particularly at a time when housing prices and interest rates are low. PHB hopes to continue several successful programs carried out in partnership with community-based non-profits such as the Minority Homeownership Assistance Collaborative, to overcome gaps in minority homeownership and foreclosure rates. These funds will be leveraged with other PHB resources - notably TIF in at least two URA's and certain federal funds to provide the down payment assistance to a subset of households that receive homebuyer education and counseling.

Reduction Packages

Cuts To Base Budget

PHB made internal budget reductions within External Materials & Services to balance the base budget, prior to mandatory reductions. The bureau is continuing staffing reductions that occurred in FY 2010-11 and FY 11-12 by eliminating two additional vacant positions in the FY 12-13 Requested Budget -- a Senior Housing Administration Specialist and a Housing Compliance Analyst III. Both of the positions identified for reduction include a General Fund funding component; however, the General Fund portion of funding is very small compared to CDBG and HOME. PHB's total staffing is 55 positions after the two position reductions.

Mandatory 8% General Fund Reduction

City bureaus are required to submit cuts to ongoing general fund at a 4%, 6% and 8% level. These cuts amount to \$251,345, \$377,018 and \$502,691 respectively. The cuts will reduce various contracts in the shelter and emergency services program, as PHB utilizes federal dollars or TIF in the other program areas, which are taking a larger reduction. Programs with a higher priority in the Strategic Plan generally had lesser reductions. The following is a sample of the impacts will result from an 8% cut:

- 380 fewer families, seniors, women and disabled individuals moved from the streets and shelters into stable housing
- 480 fewer people served in Winter shelter
- 1,380 fewer homeless and formerly homeless people receiving supportive and housing retention services or assistance securing SSI/SSDI benefits
- 150 fewer households who are transitioning from homelessness will receive furnishings when they move into housing
- Bud Clark Commons day center will see a reduction in the total operating hours of the day
- 540 fewer people will receive basic services at Bud Clark Commons

Summary of Bureau Budget

	FY 2009-10	FY 2010-11	FY 2011-12	FY 2012-13	FY 2012-13
	Year-End	Year-End	Revised	Requested	Requested
	Actuals	Actuals	Budget	Without DP's	Budget
Portland Housing Bureau					
Expenditures					
Unappropriated Fund Balance	3,952,604	0	0	0	0
Personal Services	2,946,465	6,313,229	5,903,831	5,546,757	5,546,757
External Materials and Services	39,775,949	70,883,414	114,089,742	75,576,353	79,848,962
Internal Materials and Services	1,330,624	2,841,089	1,169,005	1,188,375	1,188,375
Capital Outlay	12,155	0	1,563,882	0	0
Debt Service	9,144,884	1,339,826	1,186,748	1,292,086	1,292,086
Fund Transfers - Expense	1,220,955	2,144,288	143,238	881,930	881,930
Contingency	0	0	2,524,140	2,712,955	2,712,955
Total Expenditures	58,383,636	83,521,846	126,580,586	87,198,456	91,471,065
Resources					
Budgeted Beginning Fund Balance	704,958	0	1,552,446	3,992,645	3,992,645
Charges for Services	7,000	355,528	260,800	213,908	213,908
Intergovernmental Revenues	27,036,639	61,069,348	98,154,204	63,386,855	63,386,855
Interagency Revenue	11,500	57,748	0	35,129	35,129
Fund Transfers - Revenue	344,143	2,139,288	3,855	0	0
Bond and Note Proceeds	11,825,138	4,704,000	8,313,777	12,275,185	12,275,185
Miscellaneous Sources	6,316,363	8,256,938	6,753,989	1,011,100	1,011,100
General Fund Discretionary	12,137,896	0	11,541,515	6,283,634	10,556,243
Total Resources	58,383,636	76,582,849	126,580,586	87,198,456	91,471,065

**Total FTE and Salary by Class
Portland Housing Bureau**

Class	Title	CY_REVBUD {Rep}		V52_NO_DP {Rep}		V52_TOTAL {Rep}	
		No.	Amount	No.	Amount	No.	Amount
30000062	Accountant I	1.00	53,124	1.00	53,124	1.00	53,124
30000064	Accountant III	1.00	66,888	1.00	66,888	1.00	66,888
30000433	Administrative Specialist, Sr	1.00	72,924	1.00	72,924	1.00	72,924
30000441	Business Operations Manager	1.00	100,044	1.00	100,044	1.00	100,044
30000569	Financial Analyst, Principal	1.00	99,732	1.00	99,992	1.00	99,992
30000568	Financial Analyst, Sr	1.00	63,384	1.00	63,384	1.00	63,384
30001592	Housing Administrative Specialist, Sr	4.00	168,252	4.00	170,046	3.00	128,562
30001361	Housing Construction Coordinator	2.00	141,684	2.00	144,096	2.00	144,096
30001362	Housing Construction Coordinator, Sr	3.00	233,182	3.00	236,216	3.00	236,216
30001363	Housing Development Finance Coordinator	2.00	167,280	2.00	167,280	2.00	167,280
30000417	Housing Director	1.00	125,004	1.00	128,847	1.00	128,847
30001260	Housing Director, Assistant	1.00	102,660	1.00	105,117	1.00	105,117
30001587	Housing Financial Analyst	1.00	75,672	1.00	75,672	1.00	75,672
30001588	Housing Financial Analyst, Assistant	1.00	67,956	1.00	68,616	1.00	68,616
30001367	Housing Lead Grant Program Coordinator	1.00	68,100	1.00	69,724	1.00	69,724
30001369	Housing Loan Compliance Analyst II	1.00	63,852	1.00	63,852	1.00	63,852
30001370	Housing Loan Compliance Analyst III	1.00	54,084	1.00	54,084	0.00	12
30001364	Housing Loan Coordinator	1.00	44,532	1.00	44,532	1.00	44,532
30001365	Housing Loan Coordinator, Sr	2.00	130,596	2.00	135,951	2.00	135,951
30001596	Housing Management Assistant	1.00	53,064	1.00	55,242	1.00	55,242
30001608	Housing Policy Manager	1.00	88,008	1.00	91,308	1.00	91,308
30001595	Housing Program Coordinator	8.00	566,500	7.90	577,432	7.90	577,432
30001593	Housing Program Specialist	5.00	315,250	5.00	324,244	5.00	324,244
30001594	Housing Program Specialist, Assistant	4.00	233,316	4.00	236,942	4.00	236,942
30000453	Management Analyst, Principal	1.00	94,728	1.00	97,635	1.00	97,635
30000452	Management Analyst, Sr	1.00	84,636	1.00	84,636	1.00	84,636
30000012	Office Support Specialist II	1.00	43,956	1.00	43,956	1.00	43,956
30000464	Program Coordinator	2.00	135,906	2.00	138,916	2.00	138,916
30000465	Program Manager	3.00	240,816	3.00	246,704	3.00	246,704
30000466	Program Manager, Sr	1.00	100,044	1.00	100,044	1.00	100,044
30000495	Public Information Officer	1.00	71,016	1.00	72,456	1.00	72,456
Total Full-Time Positions		56.00	\$3,926,190	55.90	\$3,989,904	53.90	\$3,894,348
30001591	Housing Business Systems Analyst, Asst	1.00	54,045	1.00	56,262	1.00	56,262
Total Limited Term Positions		1.00	\$54,045	1.00	\$56,262	1.00	\$56,262
Grand Total		57.00	\$3,980,235	56.90	\$4,046,166	54.90	\$3,950,610

Administration & Support

Description

The Administration & Support program is comprised of the Director's Office, Business Operations division, and Equity, Policy, and Communications division.

Director's Office

The Director's Office includes executive level support and the bureau director. The director has three direct reports: the Assistant Housing Director responsible for Housing Programs; the CFO/Business Operations Manager, and the Housing Policy Manager responsible for Equity, Policy & Communications.

Business Operations Division

The Business Operations division includes Finance, Accounting, Asset Management, Loan Servicing, Human Resources, Information Technology, Data Analysis & Research, Compliance, Audits, and Administrative Support. These functions ensure that the service delivery teams have adequate information and support to carry out their functions in the most efficient and effective means possible. Within the Business Operations division, there are six direct reports to the CFO/Business Operations Manager, including: the Principal Financial Analyst responsible for Finance and Accounting, the Senior Management Analyst responsible for Data and IT, the Program Manager responsible for Asset Management and Loan Servicing, the Executive Assistant/Administrative Supervisor responsible for Executive Level Support and Administrative Team oversight, the Program Coordinator responsible for Compliance & Human Resources, and the Program Specialist responsible for Compliance-Environmental Review-Non-Profit Tax Exemption program.

Equity, Policy, and Communications

The Equity, Policy, and Communications division includes: Strategic Planning, Public Involvement, Media Relations, Internal & External Communications, Housing Policy Development and Management, Resource Development, Legislative and Intergovernmental Affairs, and Administrative Support. The role of the Equity, Policy, and Communications division is to ensure that future policy and implementation decisions of PHB improve housing access and economic opportunities for traditionally under-served populations. It will also ensure that PHB makes its development and programmatic investments within a sound strategic plan and framework that addresses the most critical housing needs. This division also works to connect PHB's work with the work of other City bureaus and regional governments and to ensure that PHB is well-informed by housing needs data and public input.

Within the Equity, Policy, and Communications Division, there are five direct reports to the Equity, Policy and Communications Manager, including: a Principal Management Analyst responsible for housing policy development, legislative affairs, and public involvement, two Program Coordinators responsible for planning and public involvement, a Public Information Officer responsible for communications and media relations, and the Senior Administrative Specialist responsible for administrative support.

Goals

The goals of the Director's Office include:

- Provide long-range vision and overall direction for Portland's affordable housing investments

- Ensure the bureau advances goals, strategies, and investment priorities from the PHB Strategic Plan, with a focus on advancing PHB's emerging social equity agenda
- Work collaboratively with a wide range of partners to solve the unmet housing needs of the people of Portland

The goals of the Business Operations Division include:

- Ensure that administrative functions are delivered consistently, reliably and effectively
- Provide strong financial and accounting services
- Guide informed lending decisions and proactive asset management, including early assessment of risk and opportunity in the public investment in the affordable housing portfolio
- Deliver excellence in compliance services
- Support the bureau's equity goals through internal business practices, quality data, contract goals and publications on the website
- Strengthen data collection, data analysis and data reporting through maximizing the use of all information technology systems
- Ensure timely, confidential and supportive human resource services

The goals of the Equity, Policy and Communications Division include:

- Provide an equity lens to all PHB business, policies and decision-making
- Ensure that future policy and implementation decisions of PHB improve housing access and economic opportunities for traditionally under-served populations
- Guide PHB investments within a sound strategic plan to positively impact the most critical housing needs
- Connect PHB's work with the work of other City bureaus and regional governments
- Inform PHB on current housing needs data and public input to direct policies and practices
- Provide effective internal and external communications

Performance

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

Changes to Services and Activities

Based on the recommendations of the cross-functional budget team, PHB is implementing internal operational efficiencies, which equate to funding reductions in the budget:

- Reduce employees work schedules (fewer hours worked per pay period)
- Reduce vacant positions
- Reduce sponsorships, memberships and subscriptions
- Minimize travel/training budget
- Audit use/necessity of all IT related devices including servers, e-mail boxes, fax lines, smart phones, software licenses
- Grants Office and Printing & Distribution interagency reductions
- Reduce office supplies
- Reduce funding for public involvement (renting meeting rooms, food/beverage service)
- Sublease empty office space at PHB to the Office of Equity & Human Relations

Summary of Program Budget

	FY 2009-10	FY 2010-11	FY 2011-12	FY 2012-13	FY 2012-13
	Year-End	Year-End	Revised	Requested	Requested
	Actuals	Actuals	Budget	Without DP's	Budget
Administration & Support					
Administration & Support	0	465,252	394,075	478,741	478,741
Administration	56,703	73	0	0	0
Business Services	2,931,582	4,812,394	6,070,643	4,728,651	4,728,651
Director's Office	684,916	582,556	536,760	389,521	389,521
Planning & Policy	125,883	700,123	910,008	784,368	784,368
Total Administration & Support	3,799,084	6,560,399	7,911,486	6,381,281	6,381,281

Portland Housing Bureau
Performance Measures

Performance Measure	Type	FY 2009-10 Year-End Actuals	FY 2010-11 Year-End Actuals	FY 2011-12 Revised Budget	FY 2012-13 Performance No Dec Pkg	FY 2012-13 Performance With Dec Pkg
Administration & Support						
HC_0085 - Percent PHB data users providing accurate & timely data	EFFECTIVE	75%	85%	85%	90%	90%
HC_0083 - Admin costs as a percent of bureau-level budget	EFFICIENCY	9%	7%	8%	8%	8%
HC_0082 - Number of sub-recipient contracts processed	WORKLOAD	101	93	90	90	90
HC_0084 - Number of users trained and supported in PHB data systems	WORKLOAD	707	859	860	900	900
HC_0086 - Number of housing assets monitored	WORKLOAD	305	315	315	315	315

Housing Access & Stabilization

Description

The bureau's Housing Access & Stabilization program (HAS) creates opportunities for housing stability for thousands of households per year by investing in programs and coordinating community initiatives. In FY 2010-11 HAS funding assisted nearly 4,500 families and individuals by preventing their homelessness, supporting their transition to greater housing stability, and/or enabling them to secure permanent homes.

HAS funds are contracted to 16 nonprofit and public agencies to provide a comprehensive range of services that address the diverse needs of people experiencing homelessness, from street outreach to permanent housing placement. Services primarily fall into four categories:

- Access and Stabilization Services
- Prevention and Rapid Re-Housing
- Supportive Housing
- Shelter and Emergency Services

Goals

The HAS is fully aligned with the goals of the 10-Year Plan to End Homelessness for Portland and Multnomah County, adopted by Portland City Council and the Multnomah County Commission in December 2004.

HAS staff members facilitate and influence the broader community-wide process that implements and evaluates progress of the 10-Year Plan. HAS also works within PHB to align broader bureau resources with community-wide strategies to reduce homelessness, including through the Consolidated Plan. In Fall 2010, the HAS team was augmented by staff and programs focused on access and stabilization that include 211Info as well as HOPWA-funded programs.

Performance

Performance of the HAS can be found in the performance measures table, which includes both trend and projection information. (Technical note - PHB has expanded the performance measures for households receiving rent assistance and housing placement to include both new households and households receiving ongoing support.)

Changes to Activities and Services

Reductions in federal funds (CDBG and HOME) will result in reductions to currently high-performing contracts. Smaller reductions were made in functional areas and contracts that are aligned with the core PHB mission and values. HAS will measure the performance of its contracts with an equity lens and work to improve services to populations overrepresented in homeless statistics. There will be increased jurisdictional coordination, including an in depth review of the 10-Year Plan, as well as shelter and rent assistance refinements that will equate to shorter shelter stays. The team will work towards stronger connections between HAS efforts and the City-supported affordable housing portfolio, and also make progress against PHB strategic plan goals.

Summary of Program Budget

	FY 2009-10	FY 2010-11	FY 2011-12	FY 2012-13	FY 2012-13
	Year-End	Year-End	Revised	Requested	Requested
	Actuals	Actuals	Budget	Without DP's	Budget
Housing Access & Stabilization					
Housing Access & Stabilization	429,223	31,025	3,920	0	0
Access and Stabilization	0	0	1,460,448	1,959,644	2,373,144
Community Planning	57	0	0	0	0
Shelter & Emergency Services	1,838,579	2,025,554	5,107,303	2,936,099	4,582,060
Transitional Housing	3,740,252	6,433,739	0	0	0
Supportive Housing	4,895,957	3,703,806	4,305,175	3,835,222	3,673,821
Public Safety and Livability	687,052	0	0	0	0
Prevention & Rapid Rehousing	733,503	1,074,294	3,169,716	1,307,151	3,181,700
Total Housing Access & Stabilization	12,324,624	13,268,418	14,046,562	10,038,116	13,810,725

Portland Housing Bureau
Performance Measures

Performance Measure	Type	FY 2009-10 Year-End Actuals	FY 2010-11 Year-End Actuals	FY 2011-12 Revised Budget	FY 2012-13 Performance No Dec Pkg	FY 2012-13 Performance With Dec Pkg
Housing Access & Stabilization						
HC_0050 - Percent of exits from shelter to stable housing	EFFECTIVE	28%	31%	31%	27%	30%
HC_0054 - Percent of households exited to long-term housing	EFFECTIVE	72%	61%	61%	51%	61%
HC_0062 - Percent of households receiving placement assistance at 6 months	EFFECTIVE	83%	86%	86%	85%	85%
HC_0063 - Percent of households receiving placement assistance at 12 months	EFFECTIVE	74%	76%	76%	75%	75%
HC_0065 - Percent of households exited into long-term housing with supportive services	EFFECTIVE	92%	71%	71%	65%	71%
HC_0095 - Average length of rent assistance, eviction prevention (in days)	EFFECTIVE	0	121	121	121	121
HC_0055 - Average length of stay in transitional housing (in days)	EFFICIENCY	309	254	254	255	255
HC_0049 - Number of households served in emergency shelters	WORKLOAD	1,935	1,635	1,635	870	1,640
HC_0053 - Number of households served in interim housing	WORKLOAD	286	338	338	300	300
HC_0057 - Number of households receiving rent assistance / eviction prevention	WORKLOAD	423	1,373	1,373	750	1,375
HC_0061 - Number of households receiving placement assistance	WORKLOAD	515	1,713	1,713	1,200	1,700
HC_0064 - Number of households residing in long-term assisted housing with supportive services	WORKLOAD	865	728	865	1010	1165

Economic Opportunity

Description

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

The CDBG allocation for FY 2012-13 reflects the bureaus estimate of a 15% reduction in the CDBG entitlement allocation.

Goals

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

Changes to Activities and Services

Information on changes is available in the PDC budget.

Summary of Program Budget

	FY 2009-10	FY 2010-11	FY 2011-12	FY 2012-13	FY 2012-13
	Year-End	Year-End	Revised	Requested	Requested
	Actuals	Actuals	Budget	Without DP's	Budget
Economic Opportunity					
Economic Opportunity	74,516	5,090	2,471,312	2,114,907	2,114,907
Workforce Development	2,492,068	2,364,408	0	0	0
Economic Opportunity Initiatives	551,483	(14,097)	0	0	0
Microenterprise Growth	302,462	952,600	0	0	0
Total Economic Opportunity	3,421,530	3,308,001	2,471,312	2,114,907	2,114,907

Housing Production & Preservation

Description

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

Funds for new housing development or preservation are made available through competitive funding cycles.

Goals

This team has four major components:

1. Catalyzing affordable housing development through the disposition of publicly owned property in conjunction with PHB financing commitments
2. Strategically investing public resources to create and maintain a portfolio of affordable housing equally available to the community,
3. Structuring investments through the negotiation of loan terms and underwriting and closing these loans and grants in partnership with the City Attorney's office and, as necessary, OMF
4. Providing oversight and disbursements of PHB funds to projects while in construction

Performance

The HDF performance can be seen in the Performance Measures table which includes trends and projections for performance.

Changes to Services and Activities

Current local market conditions are putting substantial upward pressure on rents, making rental housing in Portland more expensive and harder to access for anyone with any barriers. In response, the HDF team, in conjunction with PHB's Asset Management group, will conduct a review of its investment and monitoring processes. The goals include: improving efficiency, making sure limited resources are deployed most effectively to leverage other community amenities (employment, education, transportation, health, etc.) and financial resources, ensuring that resources are deployed equitably, and to monitor the public investment in the City's affordable housing infrastructure in such a way as to proactively take advantage of opportunities to increase the public benefit and control risk.

These efforts will be informed by: an analysis of the PHB loan portfolio as well as a capital needs assessment of existing projects in which the City has previously invested, the Portland Plan and the Housing Strategy currently underway, review of the utilization of investment dollars during construction and by end users through an equity lens, and work with community partners and stakeholders.

Summary of Program Budget

	FY 2009-10	FY 2010-11	FY 2011-12	FY 2012-13	FY 2012-13
	Year-End	Year-End	Revised	Requested	Requested
	Actuals	Actuals	Budget	Without DP's	Budget
Housing Production & Preservation					
Housing Production & Preservation	1,451,231	1,594,038	0	0	0
Rental Housing Access & Stabilization	5,087,865	3,004,368	1,262,147	0	0
Housing Development Support	0	0	1,192,573	1,290,567	1,290,567
Homeownership	5,544,137	(12,578)	0	0	0
Preservation	888	0	8,341,004	13,923,530	13,923,530
New Construction	0	224	62,383,336	34,476,341	34,476,341
Rehabilitation	12,435,835	38,828,105	16,208,519	7,836,842	7,836,842
Total Housing Production & Preservation	24,519,955	43,414,159	89,387,579	57,527,280	57,527,280

Portland Housing Bureau
Performance Measures

Performance Measure	Type	FY 2009-10 Year-End Actuals	FY 2010-11 Year-End Actuals	FY 2011-12 Revised Budget	FY 2012-13 Performance No Dec Pkg	FY 2012-13 Performance With Dec Pkg
Housing Production & Preservation						
HC_0069 - Vacancy rate of units built 0 to 60% MFI	EFFECTIVE	3%	5%	5%	5%	5%
HC_0092 - Expiring section 8 rental units preserved at 0-60% MFI	EFFECTIVE	0	156	150	150	150
HC_0091 - Investment per affordable housing unit	EFFICIENCY	\$0	\$27,078	\$27,078	\$30,000	\$30,000
HC_0093 - Investment per expiring section 8 housing unit preserved	EFFICIENCY	\$0	\$21,250	\$21,250	\$25,000	\$25,000
HC_0094 - Investment per affordable unit rehabilitated	EFFICIENCY	\$0	\$21,518	\$21,518	\$25,000	\$25,000
HC_0070 - Rental units built affordable for 0 to 60% MFI	WORKLOAD	256	92	100	100	100
HC_0072 - Rental units built affordable for 61+ to 100% MFI	WORKLOAD	16	0	5	5	5
HC_0081 - Rental rehab units 0 to 60% MFI	WORKLOAD	397	181	180	180	180

Homeowner Access & Retention

Description

Homeowner Access & Retention (HAR) (previously Neighborhood Housing Programs) funds services to help new homebuyers access homeownership opportunities and support current homeowners in retaining their homes. Support for low income first time homebuyers includes education and counseling, and assistance provided for down payments and closing costs. HAR helps current homeowners retain their homes by funding foreclosure prevention education and counseling.

Funding for home repair grants and loans also helps current homeowners maintain their homes. Programs to improve the condition of existing housing addresses the impact that housing condition can have on health. These "healthy homes" programs include administration of federal funds to reduce lead-based paint hazards in homes with young children, and federal grant funds to address habitability issues.

Finally, HAR administers programs that provide incentives for the development of new homeownership opportunities for low and moderate income households, including System Development Charge waivers and Limited Tax Exemptions.

Goals

The goals of the Homeowner Access & Retention section include:

- Closing the minority homeownership gap.
- Provide foreclosure prevention education and counseling
- Provide support to current homeowners so they can retain their homes
- Enable homeownership by providing down payment assistance and closing costs, education and counseling

Performance

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

Changes to Services and Activities

In alignment with the bureau's Strategic Plan, HAR will strengthen the services provided to potential homebuyers and existing households of color, ensure that the current programs are providing optimum customer service, and complement existing services available in the private market. HAR will measure its performance and that of its contractors with an equity lens, and set goals aimed at closing the minority homeownership gap. Responding to the current market, HAR will convene stakeholders to evaluate homeownership and foreclosure data to develop strategies to address needs, gaps, and opportunities, including identifying additional resources to bring to the community for this work.

Summary of Program Budget

	FY 2009-10	FY 2010-11	FY 2011-12	FY 2012-13	FY 2012-13
	Year-End	Year-End	Revised	Requested	Requested
	Actuals	Actuals	Budget	Without DP's	Budget
Homeowner Access & Retention					
Homeowner Access & Retention	0	1,407	0	0	0
Homebuyer & Foreclosure Education/Counseling	0	651,484	763,425	235,036	735,036
Homebuyer Financial Assistance	0	2,641,136	2,609,407	1,949,822	1,949,822
Homeownership Development	0	5,116,656	0	24	24
Healthy Homes	0	7,236	2,632,762	1,951,817	1,951,817
Home Repair	0	5,068,838	2,622,447	1,841,874	1,841,874
Tax Exemption & Fee Waiver	0	0	281,480	271,328	271,328
Total Homeowner Access & Retention	0	13,486,756	8,909,521	6,249,901	6,749,901

Portland Housing Bureau
Performance Measures

Performance Measure	Type	FY 2009-10 Year-End Actuals	FY 2010-11 Year-End Actuals	FY 2011-12 Revised Budget	FY 2012-13 Performance No Dec Pkg	FY 2012-13 Performance With Dec Pkg
Homeowner Access & Retention						
HC_0038 - Number of households receiving homebuyer education/counseling and purchasing homes	EFFECTIVE	338	282	282	200	285
HC_0090 - Average investment for elderly/disabled receiving small home repairs	EFFICIENCY	\$0	\$1,136	\$1,136	\$1,140	\$1,140
HC_0096 - Investment per household owner occupied home repair	EFFICIENCY	\$0	\$13,292	\$13,292	\$13,000	\$13,000
HC_0037 - Number of households receiving homebuyer education or counseling	WORKLOAD	898	1,384	1,384	800	1,385
HC_0074 - Homeownership units built	WORKLOAD	284	142	140	140	140
HC_0076 - Number of owner occupied home repair loans	WORKLOAD	109	41	40	20	35
HC_0088 - Number of homeownership units assisted by limited tax exemptions	WORKLOAD	0	137	137	135	135
HC_0089 - Number of units assisted by system development charge waivers	WORKLOAD	0	143	143	145	145
HC_0097 - Number of households attending homebuyer fairs	WORKLOAD	0	810	810	0	0
HC_0098 - Number of elderly/disabled households receiving small scale repairs	WORKLOAD	0	1,510	1,510	1,400	1,500