

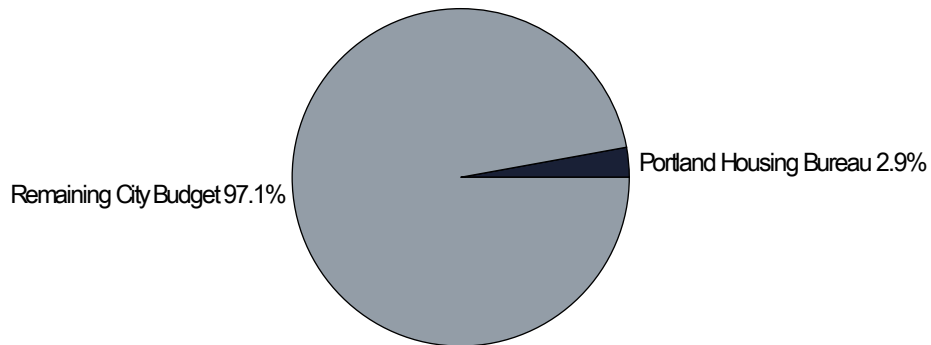
Portland Housing Bureau

Community Development Service Area

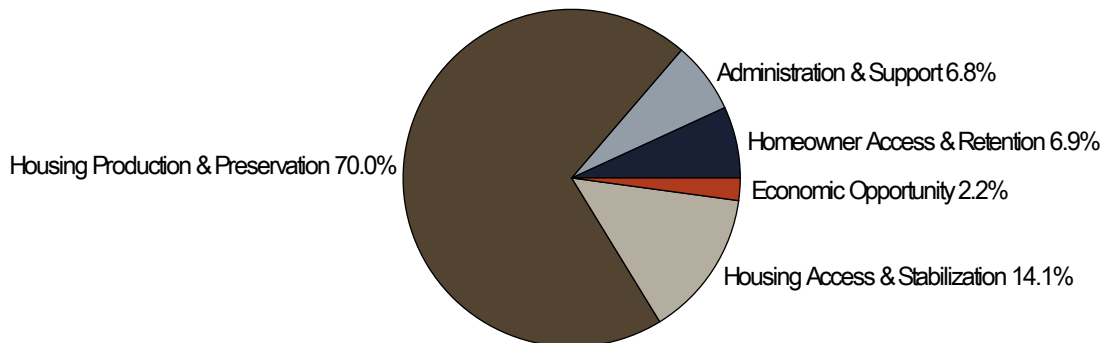
Nick Fish, Commissioner-in-Charge

Traci Manning, Director

Percent of City Budget

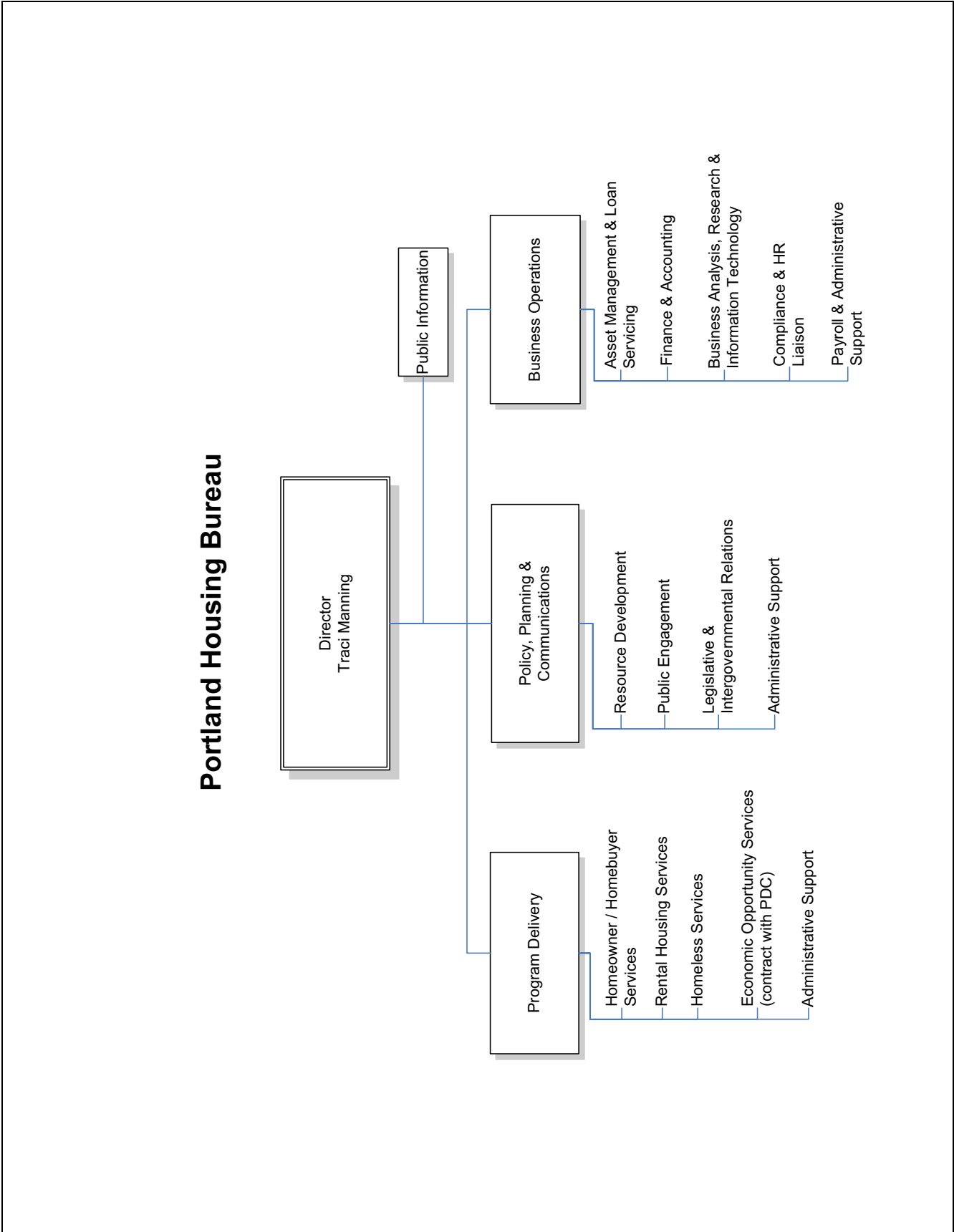


Bureau Programs



Bureau Overview

Requirements	Revised FY 2011-12	Adopted FY 2012-13	Change from Prior Year	Percent Change
Operating	113,528,291	102,678,297	(10,849,994)	(9.56)
Capital	0	0	0	0.00
Total Requirements	113,528,291	102,678,297	(10,849,994)	(9.56)
Authorized Positions	57.00	54.90	(2.10)	(3.68)



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 bureau strategic plan through 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 which 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 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:

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 2012-13. 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.

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 the bureau originates and services housing loans, conducts asset 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 held its first HDS stakeholder group meeting in February 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.

Set clear, measureable equity targets

In FY 2011-12, 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 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 data, and refine the process.

Summary of Budget Decisions

PHB Budget Structure

PHB's resources are budgeted 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 a 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 community 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.

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 Proposed Budget, and they offset approximately \$0.2 million 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 Adopted Budget reflects cuts in each of these funds achieved through programmatic reductions based on PHB strategic plan priorities.

Add Packages

The Adopted Budget includes add packages totaling \$4,909,753.

Prevention and Rapid Re-Housing

Short-term rent assistance is a highly effective tool to prevent eviction, to 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 that leverage non-City resources.

Homebuyer Support

This package provides \$500,000 of one-time General Fund to support homebuyer education and counseling and foreclosure prevention programs. These services include outreach to minority communities and assistance to groups underrepresented in homeownership in gaining access to new opportunities. Services also attempt to maintain current homeownership among those communities at a time. To a subset of those households receiving homebuyer education and counseling and living in Urban Renewal Areas, PHB is able to leverage these funds with downpayment assistance using TIF resources

Housing Access Services

This \$456,300 one-time General Fund package continues 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 helps 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 PHB's commitment 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, leverages other funding sources and invests them in the three types of shelters PHB supports: year-round, winter, and severe weather. Shelter operations remain a critical component of the safety net for the community. 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 of the Bud Clark Commons. This amount is down from the \$390,000 in FY 2011-12. 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.

Reduction Packages

The Adopted Budget includes reduction packages totaling \$421,663.

Cuts To Base Budget

PHB made internal budget reductions within external materials and services to balance the base budget, prior to mandatory reductions. The bureau is continuing staffing reductions that occurred in FY 2010-11 and FY 2011-12 by eliminating two additional vacant positions -- a Senior Housing Administration Specialist and a Housing Compliance Analyst III. Both of the positions identified for reduction are partially funded with General Fund resources; however, the General Fund portion of funding is very small compared to CDBG and HOME funding, which was more deeply cut in Federal budget reductions.

6.1% General Fund Programmatic Reduction

In the Adopted Budget, the PHB ongoing budget is reduced by \$386,018 in General Fund discretionary resources. The cut will reduce various contracts in the shelter and emergency services program, while programs with a higher priority in the strategic plan generally take lesser reductions.

OMF Interagency Adjustments

The package reflects a decrease of \$35,645 in interagency costs resulting from decision packages in the Office of Management and Finance. An adjustment to the bureau's ongoing General Fund discretionary target was made to balance the decreased costs.

Non-Represented Merit Freeze

The package reflects a decrease of \$2,547 in personnel services costs resulting from a freeze on merit increases in FY 2012-13 for non-represented employees making more than \$45,000 per year.

Budget Notes

Portland Housing Bureau Sustainable Funding

Council directs the Office of Management and Finance to add sustainable funding for the Safety Net to the FY 2013-14 5-year forecast. The Office of Management and Finance should increase the Portland Housing Bureau's current appropriation level target by \$4,600,000, which will replace the bureau's historic reliance on one-time funds.

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 and Communications.

Business Operations Division

The Business Operations division includes Finance, Accounting, Asset Management, Loan Servicing, Human Resources, Information Technology, Data Analysis and 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 and 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; and ◆ 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; and ◆ 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; and ◆ 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 and training budget

Portland Housing Bureau

Community Development Service Area

- ◆ Audit use and 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 and beverage service)
- ◆ Sublease empty office space at PHB to the Office of Equity & Human Rights

FTE & Financials	Actual FY 2009-10	Actual FY 2010-11	Revised FY 2011-12	Proposed FY 2012-13	Adopted FY 2012-13
FTE	24.00	34.00	35.00	33.00	33.40
Expenditures					
Administration	56,703	74	0	0	0
Administration & Support	0	465,245	394,075	478,741	779,457
Business Services	2,931,582	4,812,698	6,064,314	4,692,994	4,729,676
Director's Office	684,916	582,558	516,760	386,986	283,508
Planning & Policy	125,883	700,125	737,008	784,368	936,860
Total Expenditures	3,799,084	6,560,700	7,712,157	6,343,089	6,729,501
Performance	Actual FY 2009-10	Actual FY 2010-11	Yr End Est. FY 2011-12	Base FY 2012-13	Target FY 2012-13
Effectiveness					
% PHB Data Users Providing Accurate & Timely Data	75%	85%	85%	90%	90%
Efficiency					
Admin Costs As a % Of Bureau Level Budget	9%	7%	8%	8%	8%
Workload					
Number of Sub-recipient Contracts Processed	101	93	90	90	90
# of Users Trained And Supported In PHB Data Systems	707	859	860	900	900
# of Housing Assets Monitored	305	315	315	315	315

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 is available in the PDC budget.
Performance	Information on performance is available in the PDC budget.
Changes to Activities and Services	Information on changes is available in the PDC budget.

FTE & Financials	Actual FY 2009-10	Actual FY 2010-11	Revised FY 2011-12	Proposed FY 2012-13	Adopted FY 2012-13
Expenditures					
Economic Opportunity	75,516	5,090	2,471,312	2,114,907	2,114,907
Economic Opportunity Initiatives	551,483	(14,097)	0	0	0
Microenterprise Growth	302,462	952,600	0	0	0
Workforce Development	2,492,068	2,364,408	0	0	0
Total Expenditures	3,421,530	3,308,001	2,471,312	2,114,907	2,114,907

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 (i.e. Housing Opportunities for Persons with AIDS).

Performance

Performance of the HAS can be found in the performance measures table, which includes both trend and projection information. 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 toward PHB strategic plan goals.

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FTE & Financials	Actual FY 2009-10	Actual FY 2010-11	Revised FY 2011-12	Proposed FY 2012-13	Adopted FY 2012-13
FTE	5.00	5.00	3.65	3.55	3.45
Expenditures					
Access and Stabilization	0	0	2,530,137	2,373,144	763,185
Community Planning	57	0	0	0	0
Housing Access & Stabilization	429,223	31,022	3,920	0	0
Prevention & Rapid Rehousing	733,503	1,074,295	3,177,587	2,981,700	3,124,900
Public Safety and Livability	687,052	0	0	0	0
Shelter & Emergency Services	1,838,579	2,025,553	5,115,636	4,698,733	4,713,418
Supportive Housing	4,895,957	3,703,809	4,335,807	3,673,821	5,255,600
Transitional Housing	3,740,252	6,433,742	0	0	0
Total Expenditures	12,324,624	13,268,421	15,163,087	13,727,398	13,857,103
Performance	Actual FY 2009-10	Actual FY 2010-11	Yr End Est. FY 2011-12	Base FY 2012-13	Target FY 2012-13
Effectiveness					
Percent of exits from shelter into stable housing	28%	31%	31%	27%	30%
Percent of households exited from interim housing into longterm assisted housing with support services	72%	61%	61%	51%	61%
Percent of households receiving placement assistance retaining longterm assisted housing with supportive services at 6 mos	83%	86%	86%	85%	85%
Percent of households receiving placement assistance retaining longterm assisted housing with supportive services at 12 mos	74%	76%	76%	75%	75%
Percent of households exited into longterm assisted housing with supportive services	92%	71%	71%	65%	71%
Average length of rent assistance, eviction prevention in days	NA	121	121	121	121
Efficiency					
Average length of stay in transitional housing (in days)	309	254	254	255	255
Workload					
Number of households served in emergency shelters	1,935	1,635	1,635	870	1,640
Number of households served in interim housing	286	338	338	300	300
Number of households receiving rent assistance and eviction prevention	423	1,373	1,373	750	1,475
Number of households receiving placement rent assistance	515	1,713	1,713	1,200	1,825
Number of households residing in longterm assisted housing with supportive services	865	728	865	1,010	1,165

Housing Production & Preservation

Description

The Housing Development and Finance (HDF) team is responsible for the housing production and preservation program. 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 people with 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 monitoring the public investment in the City's affordable housing infrastructure to increase 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; a review of the utilization of investment dollars during construction and by end users through an equity lens; and work with community partners and stakeholders.

FTE & Financials	Actual FY 2009-10	Actual FY 2010-11	Revised FY 2011-12	Proposed FY 2012-13	Adopted FY 2012-13
FTE	5.00	16.00	10.10	10.10	9.80
Expenditures					
Homeownership	5,544,137	(12,577)	0	0	0
Housing Development Support	0	0	1,114,021	1,290,567	1,166,836
Housing Production & Preservation	1,451,231	1,594,039	0	0	0

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FTE & Financials	Actual FY 2009-10	Actual FY 2010-11	Revised FY 2011-12	Proposed FY 2012-13	Adopted FY 2012-13
New Construction	0	224	52,435,821	34,476,341	39,297,380
Preservation	888	0	8,492,608	13,923,530	15,016,269
Rehabilitation	12,435,835	38,828,088	12,362,985	7,836,842	13,395,437
Rental Housing Access & Stabilization	5,087,865	3,004,370	0	0	0
Total Expenditures	24,519,955	43,414,144	74,405,435	57,527,280	68,875,922
Performance	Actual FY 2009-10	Actual FY 2010-11	Yr End Est. FY 2011-12	Base FY 2012-13	Target FY 2012-13
Effectiveness					
Vacancy Rate of Units Built 0 to 60% MFI	3%	5%	5%	5%	5%
Expiring Section 8 rental units preserved affordable for 0-60 MFI	NA	156	150	150	150
Efficiency					
Investment per affordable housing unit	NA	\$27,078	\$27,078	\$30,000	\$30,000
Investment per expiring Section 8 housing unit preserved	NA	\$21,250	\$21,250	\$25,000	\$25,000
Investment per affordable unit rehabilitated	NA	\$21,518	\$21,518	\$25,000	\$25,000
Workload					
Rental units built affordable for 0 to 60% MFI	256	92	100	100	100
Rental units built affordable for 61+ to 100% MFI	16	5	5	5	5
Rental Rehab Units 0 to 60% MFI	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:

- ◆ Close 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.

FTE & Financials	Actual FY 2009-10	Actual FY 2010-11	Revised FY 2011-12	Proposed FY 2012-13	Adopted FY 2012-13
FTE	0.00	11.00	8.25	8.25	8.25
Expenditures					
Healthy Homes	0	7,237	2,482,762	1,951,817	1,970,517
Home Repair	0	5,068,847	2,285,783	1,841,874	1,837,584
Homebuyer & Foreclosure Education/Counseling	0	651,487	337,610	235,036	735,036
Homebuyer Financial Assistance	0	2,641,132	2,523,997	1,949,822	1,935,710
Homeowner Access & Retention	0	1,408	0	0	0

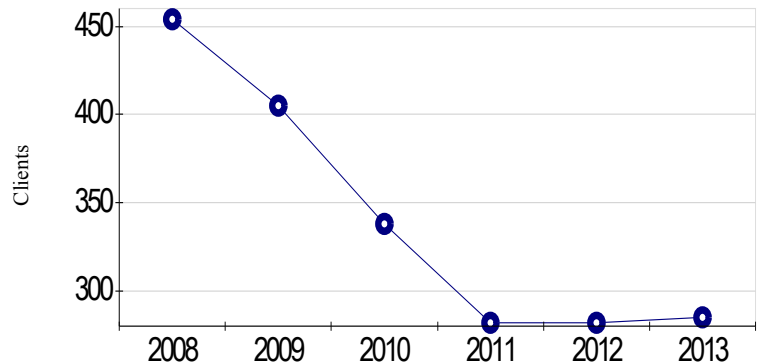
Portland Housing Bureau
Community Development Service Area

FTE & Financials	Actual FY 2009-10	Actual FY 2010-11	Revised FY 2011-12	Proposed FY 2012-13	Adopted FY 2012-13
Homeownership Development	0	5,116,660	0	24	12
Tax Exemption & Fee Waiver	0	0	212,789	271,328	271,328
Total Expenditures	0	13,486,771	7,842,941	6,249,901	6,750,187
Performance	Actual FY 2009-10	Actual FY 2010-11	Yr End Est. FY 2011-12	Base FY 2012-13	Target FY 2012-13
Effectiveness					
Number of households receiving homebuyer education/ counseling and purchasing homes	338	282	282	200	285
Efficiency					
Average investment per household for elderly/disabled receiving small home repairs	NA	\$1,136	\$1,136	\$1,140	\$1,140
Investment per household for owner occupied home repairs	NA	\$13,292	\$13,292	\$13,000	\$13,000
Workload					
Number of Households receiving homebuyer education or counseling	898	1,384	1,384	800	1,385
Homeownership units built	284	142	140	140	140
Number of owner occupied home repair loans	109	41	40	20	35
Number of homeownership units assisted by limited tax exemptions	NA	137	137	135	135
Number of Units assisted by SDC waivers	NA	143	143	145	145
Number of households attending homebuyer fairs	NA	810	810	810	810
Number of elderly/disabled households receiving small scale home repairs	NA	1,510	1,510	1,400	1,500

Performance Measures

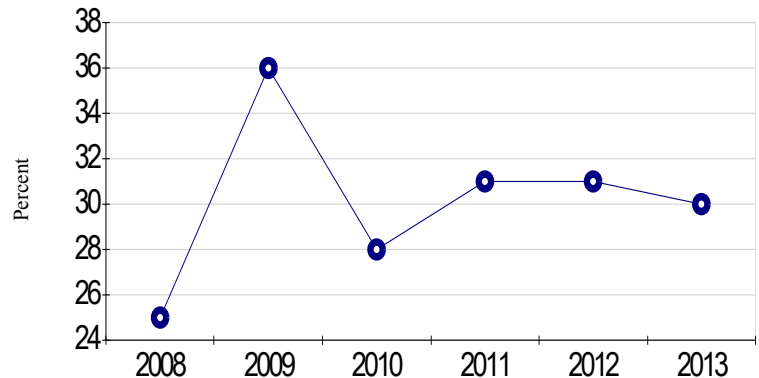
Number of Clients Purchasing Homes

The downturn in the housing markets has negatively impacted potential clients' ability to purchase homes. Additionally, PHB is generally shifting the way resources are used; the bureau is currently putting funds into more robust homebuyer counseling to ensure that those buying homes are able to stay in their homes and therefore serving fewer clients.



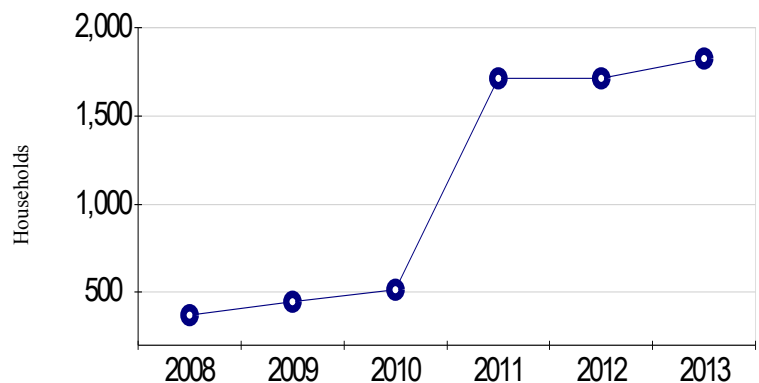
Percent of Exits from Shelter into Stable Housing

The percent of participants in the Ending Homelessness Initiative Shelter programs exiting into stable housing has remained consistent over the past two years while the number of people being served in shelter has increased.



Households Receiving Placement Rent Assistance

PHB has been able to effectively use stimulus funds through the Housing Authority of Portland to increase the number of households receiving rent assistance.



	Actual FY 2009-10	Actual FY 2010-11	Revised FY 2011-12	Proposed FY 2012-13	Adopted FY 2012-13
Resources					
External Revenues					
Charges for Services	7,000	355,537	269,800	213,908	218,924
Intergovernmental	27,036,639	61,114,560	84,185,293	63,386,855	69,344,609
Bond & Note	11,825,138	4,704,000	7,648,058	12,275,185	12,646,698
Miscellaneous	6,316,363	8,257,218	7,318,989	1,011,100	5,842,764
Total External Revenues	45,185,139	74,431,315	99,422,140	76,887,048	88,052,995
Internal Revenues					
General Fund Discretionary	12,137,896	9,059,225	11,412,386	9,934,724	10,771,724
Fund Transfers - Revenue	344,143	2,139,288	258,190	0	0
Interagency Revenue	11,500	57,748	4,000	35,129	50,939
Total Internal Revenues	12,493,539	11,256,261	11,674,576	9,969,853	10,822,663
Beginning Fund Balance	704,958	3,952,604	2,431,575	3,992,645	3,802,639
Total Resources	\$58,383,636	\$89,640,180	\$113,528,291	\$90,849,546	\$102,678,297
Requirements					
Bureau Expenditures					
Personnel Services	2,946,465	6,313,245	6,058,053	5,544,210	5,601,965
External Materials and Services	39,775,949	70,883,701	98,496,514	79,263,584	91,596,858
Internal Materials and Services	1,330,624	2,841,091	1,190,205	1,154,781	1,128,797
Capital Outlay	12,155	0	1,754,882	0	0
Total Bureau Expenditures	44,065,193	80,038,037	107,499,654	85,962,575	98,327,620
Fund Expenditures					
Debt Service	9,144,884	1,339,825	1,315,748	1,292,086	1,292,086
Contingency	0	0	4,315,316	2,712,955	2,185,582
Fund Transfers - Expense	1,220,955	2,144,288	397,573	881,930	873,009
Total Fund Expenditures	10,365,839	3,484,113	6,028,637	4,886,971	4,350,677
Ending Fund Balance	3,952,604	6,118,030	0	0	0
Total Requirements	\$58,383,636	\$89,640,180	\$113,528,291	\$90,849,546	\$102,678,297
Programs					
Administration & Support	3,799,084	6,560,700	7,712,157	6,343,089	6,729,501
Economic Opportunity	3,421,530	3,308,001	2,471,312	2,114,907	2,114,907
Homeowner Access & Retention	0	13,486,771	7,842,941	6,249,901	6,750,187
Housing Access & Stabilization	12,324,624	13,268,421	15,163,087	13,727,398	13,857,103
Housing Production & Preservation	24,519,955	43,414,144	74,405,435	57,527,280	68,875,922
Neighborhood Economic Development	0	0	(95,278)	0	0
Total Programs	44,065,193	\$80,038,037	\$107,499,654	\$85,962,575	\$98,327,620

Community Development Service Area

Class	Title	Salary Range		Revised FY 2011-12		Proposed FY 2012-13		Adopted FY 2012-13	
		Minimum	Maximum	No.	Amount	No.	Amount	No.	Amount
30000062	Accountant I	38,064	53,123	1.00	53,124	1.00	53,124	1.00	53,124
30000064	Accountant III	54,787	66,893	1.00	66,888	1.00	66,888	1.00	66,888
30000433	Administrative Specialist, Sr	41,974	64,626	1.00	72,924	1.00	72,924	1.00	72,924
30000441	Business Operations Manager	75,109	100,048	1.00	100,044	1.00	100,044	1.00	100,044
30000569	Financial Analyst, Principal	75,109	100,048	1.00	99,732	1.00	99,992	1.00	99,992
30000568	Financial Analyst, Sr	63,378	84,635	1.00	63,384	1.00	63,384	1.00	63,384
30001592	Housing Administrative Specialist, Sr	41,475	63,856	4.00	168,252	3.00	128,562	3.00	128,562
30001361	Housing Construction Coordinator	54,080	72,051	2.00	141,684	2.00	144,096	2.00	144,096
30001362	Housing Construction Coordinator, Sr	59,634	79,518	3.00	233,182	3.00	236,216	3.00	236,216
30001363	Housing Development Finance Coordinator	62,629	83,637	2.00	167,280	2.00	167,280	2.00	167,280
30000417	Housing Director	102,648	146,952	1.00	125,004	1.00	128,847	1.00	128,847
30001260	Housing Director, Assistant	86,840	117,686	1.00	102,660	1.00	105,117	1.00	105,117
30001587	Housing Financial Analyst	56,763	75,670	1.00	75,672	1.00	75,672	1.00	75,672
30001588	Housing Financial Analyst, Assistant	44,533	68,619	1.00	67,956	1.00	68,616	1.00	68,616
30001367	Housing Lead Grant Program Coordinator	59,634	79,518	1.00	68,100	1.00	69,724	1.00	69,724
30001369	Housing Loan Compliance Analyst II	41,475	63,856	1.00	63,852	1.00	63,852	1.00	63,852
30001370	Housing Loan Compliance Analyst III	54,080	72,051	1.00	54,084	0.00	0	0.00	0
30001364	Housing Loan Coordinator	44,533	68,619	1.00	44,532	1.00	44,532	1.00	44,532
30001365	Housing Loan Coordinator, Sr	56,763	75,670	2.00	130,596	2.00	135,951	2.00	135,951
30001596	Housing Management Assistant	44,533	68,619	1.00	53,064	1.00	55,242	1.00	55,242
30001608	Housing Policy Manager	75,109	100,048	1.00	88,008	1.00	91,308	1.00	91,308
30001595	Housing Program Coordinator	59,634	79,518	8.00	566,500	7.90	577,432	7.90	577,432
30001593	Housing Program Specialist	54,080	72,051	5.00	315,250	5.00	324,244	5.00	324,244
30001594	Housing Program Specialist, Assistant	44,533	68,619	4.00	233,316	4.00	236,942	4.00	236,942
30000453	Management Analyst, Principal	75,109	100,048	1.00	94,728	1.00	97,635	1.00	97,635
30000452	Management Analyst, Sr	63,378	84,635	1.00	84,636	1.00	84,636	1.00	84,636
30000012	Office Support Specialist II	31,512	43,950	1.00	43,956	1.00	43,956	1.00	43,956
30000464	Program Coordinator	60,341	80,475	2.00	135,906	2.00	138,916	2.00	138,916
30000465	Program Manager	63,378	84,635	3.00	240,816	3.00	246,704	3.00	246,704
30000466	Program Manager, Sr	75,109	100,048	1.00	100,044	1.00	100,044	1.00	100,044
30000495	Public Information Officer	63,378	84,635	1.00	71,016	1.00	72,456	1.00	72,456
TOTAL FULL-TIME POSITIONS				56.00	3,926,190	53.90	3,894,336	53.90	3,894,336
TOTAL PART-TIME POSITIONS				0.00	0	0.00	0	0.00	0
30001591	Housing Business Systems Analyst, Asst	44,533	68,619	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	54.90	3,950,598	54.90	3,950,598

This chart shows decisions and adjustments made during the budget process. The chart begins with an estimate of the bureau's Current Appropriations Level (CAL) requirements.

Action	Amount			FTE	Decision
	Ongoing	One-Time	Total Package		
FY 2012-13	82,311,485	0	82,311,485	56.90	FY 2012-13 Current Appropriation Level
CAL Adjustments					
	0	0	0	0.00	None
Mayor's Proposed Budget Decisions					
	(386,018)	0	(386,018)	0.00	6.1% base reduction
	(35,645)	0	(35,645)	0.00	OMF interagency adjustments
	0	(2,547)	(2,547)	0.00	Non-represented merit freeze
	0	1,700,000	1,700,000	0.00	Prevention and rapid rehousing
	0	456,300	456,300	0.00	Housing access services
	0	1,734,000	1,734,000	0.00	Shelter and emergency services
	0	185,000	185,000	0.00	Bud Clark Commons operating support
	0	0	0	(2.00)	Base budget realignment/position reduction
Approved Budget Additions and Reductions					
	0	200,000	200,000	0.00	Prevention and rapid rehousing additional amount
	0	500,000	500,000	0.00	Homeownership and foreclosure prevention
	0	137,000	137,000	0.00	Housing Development Strategy FY 2011-12 carryover
	0	41,500	41,500	0.00	HIF project adjustment
	0	739,678	739,678	0.00	CDBG project adjustment
	0	2,233,034	2,233,034	0.00	HOME project adjustment
	0	8,937,475	8,937,475	0.00	TIF project adjustment
	0	60,927	60,927	0.00	Other tech adjustments
Adopted Budget Additions and Reductions					
	0	65,453	65,453	0.00	HIF project adjustment
	0	581,813	581,813	0.00	CDBG project adjustment
	0	313,600	313,600	0.00	HOME project adjustment
	0	(1,358,424)	(1,358,424)	0.00	TIF project adjustment
	0	(87,011)	(87,011)	0.00	Other tech adjustments
	(421,663)	16,437,798	16,016,135	(2.00)	Total FY 2012-13 Decision Packages
			98,327,620	54.90	Total Adopted Budget