

# AGENDA

**Thursday, April 6, 2017 - 10:00 AM**  
**BOARD OF COUNTY COMMISSIONERS**

Beginning Board Order No. 2017-26

**CALL TO ORDER**

- Roll Call
- Pledge of Allegiance

**I. HOUSING AUTHORITY CONSENT AGENDA**

1. Resolution No. 1919: Approval of Housing Authority of Clackamas County Annual & Five Year Plan 2017-2022

**II. CITIZEN COMMUNICATION** *(The Chair of the Board will call for statements from citizens regarding issues relating to County government. It is the intention that this portion of the agenda shall be limited to items of County business which are properly the object of Board consideration and may not be of a personal nature. Persons wishing to speak shall be allowed to do so after registering on the blue card provided on the table outside of the hearing room prior to the beginning of the meeting. Testimony is limited to three (3) minutes. Comments shall be respectful and courteous to all.)*

**III. PRESENTATION** *(Following are items of interest to the citizens of the County)*

1. Child Abuse Prevention Presentation (Rod Cook, Children, Youth & Families)

**IV. PUBLIC HEARING** *(The following items will be individually presented by County staff or other appropriate individuals. Persons appearing shall clearly identify themselves and the department or organization they represent. In addition, a synopsis of each item, together with a brief statement of the action being requested shall be made by those appearing on behalf of an agenda item.)*

1. Public Hearing on the Proposed 2017-2021 Housing and Community Development Consolidated Plan and Proposed 2017 Action Plan (Chuck Robbins, Community Development)

**V. CONSENT AGENDA** *(The following Items are considered to be routine, and therefore will not be allotted individual discussion time on the agenda. Many of these items have been discussed by the Board in Work Sessions. The items on the Consent Agenda will be approved in one motion unless a Board member requests, before the vote on the motion, to have an item considered at its regular place on the agenda.)*

**A. Health, Housing & Human Services**

1. Approval of an Intra-Agency Services Agreement with Clackamas County Health Centers. Behavioral Health Clinic and Clackamas County Behavioral Health Division for the Transfer of Grant Funds Awarded for Supported Employment Services – Behavioral Health

2. Approval of HOME Loan Documents with Rosewood Terrace LP for the Rosewood Terrace Apartments Project – *Housing & Community Development*

**B. Department of Transportation & Development**

1. Approval of Contracts with Various Suppliers for Aggregate Rock Price Contracts for the Clackamas County Road Department - *Procurement*

**C. Public & Government Affairs**

- 1, Approval of Renewal of Contact for On-Call Strategic Communications with Envirolssues, Inc. - *Procurement*

**VI. NORTH CLACKAMAS PARKS & RECREATION DISTRICT**

1. Approval of an Intergovernmental Agreement between North Clackamas Parks & Recreation District and the City of Milwaukie to Formalize Roles and Responsibilities for Development of Wichita Park Located in the City of Milwaukie.

**VII. WATER ENVIRONMENT SERVICES**

*(Service District No. 1, Tri-City Service District & Surface Water Management Agency of Clackamas County)*

1. Approval of Add Work Agreement between the Oregon Department of Transportation and Clackamas County Service District No. 1 for OR 213: SE Lindy Street – SE King Road Utility Adjustment Work

**VIII. COUNTY ADMINISTRATOR UPDATE**

**IX. COMMISSIONERS COMMUNICATION**

**NOTE: Regularly scheduled Business Meetings are televised and broadcast on the Clackamas County Government Channel. These programs are also accessible through the County's Internet site. DVD copies of regularly scheduled BCC Thursday Business Meetings are available for checkout at the Clackamas County Library in Oak Grove. You may also order copies from any library in Clackamas County or the Clackamas County Government Channel.**

[www.clackamas.us/bcc/business.html](http://www.clackamas.us/bcc/business.html)

April 6, 2017

Housing Authority of Clackamas County Board of Commissioners

Members of the Board:

Resolution # 1919: Approval of Housing Authority Annual & Five Year Plan 2017-2022

<b>Purpose/Outcomes</b>	Approval of the Housing Authority of Clackamas County's (HACC) Annual & Five Year Plan.
<b>Dollar Amount and Fiscal Impact</b>	\$13,022,800 for Section 8 Voucher funds, \$3,879,900 in Public Housing funds and \$881,000 in Capital Grants Program funds
<b>Funding Source</b>	U.S. Department of Housing and Urban Development No County General Funds are involved.
<b>Duration</b>	Effective July 1, 2017 and terminates on June 30, 2022
<b>Previous Board Action</b>	2015-2020 Five-Year Plan approved by the HACC Board on April 2, 2015 – Resolution No. 1904
<b>Strategic Plan Alignment</b>	<ul style="list-style-type: none"> <li>• Ensure safe, healthy and secure communities</li> <li>• Sustainable and Affordable Housing</li> <li>• Build public trust through good government</li> </ul>
<b>Contact Person</b>	Chuck Robbins, HACC Executive Director (503) 650-5666
<b>Contract No.</b>	N/A

**BACKGROUND:**

The Housing Authority of Clackamas County (HACC), a Division of the Health, Housing and Human Services Department, requests the approval of Resolution # 1919: Approval of the Housing Authority's Annual & Five Year Plan. A public hearing was held on March 16th, 2017, to receive and consider public comments on HACC's Plan, however, no comments were received.

The Annual & Five Year Plan will be effective July 1st, 2017. The purpose of the Plan is to provide an annual update to HUD (U.S. Department of Housing and Urban Development) regarding the Housing Authority's policies, rules, and requirements concerning its operations, programs and services. The Annual Plan can be amended during the implementation year by calling a public hearing in front of the Board of County Commissioners and by providing notification of the amendment of modification to HUD. The amendment will be approved in accordance with HUD's plan review procedures, as provided in the Code of Federal Regulations (CFR) 903.23.

Per the requirements of the Quality Housing and Work Responsibility Act (QHWRA) of 1998, this Annual & Five Year Plan was developed in consultation with the Resident Advisory Board (RAB). The RAB is made up of residents from Public Housing and Section 8 programs. The RAB met on January 19th, 2017 to review the Annual & Five Year Plan. HACC posted a public notice opening the Annual & Five Year Plan for public review and comments from January 21, 2017 through March 7th, 2017. The Plan was made available at the HACC Administrative Office, HACC Property Management Offices, Clackamas County Oak Grove Library, and was posted on HACC's website.

A public hearing in front of the Board was held on March 16<sup>th</sup>, 2017. A public notice was published on January 12th, 2017 for the public hearing.

Once the Board adopts the Annual & Five Year Plan, including all attachments, the Plan will be submitted to HUD. This final step is required to be completed at least 75 days before the beginning of our fiscal year (7/1/2017).

**RECOMMENDATION:**

Staff recommends that the HACC Board of County Commissioners approve Resolution #1919, and permit staff to submit the final version of the plan to HUD no later than April 17<sup>th</sup>, 2017.

Respectfully submitted,

Richard Swift, Director  
Health, Housing & Human Services



**In the Matter of Approving the Housing Authority's Annual & Five Year Plan (Agency Plan), and related Certifications and Attachments**

RESOLUTION NO. 1919

WHEREAS, the Housing Authority of Clackamas County (HACC), Oregon has developed a Five Year Plan (Agency Plan) and

WHEREAS, the Annual Plan must be updated each year while the Five Year Plan is developed every five years, and

WHEREAS, the Agency Plan and its attachments, was developed using the required HUD templates and with input and recommendations from an established Resident Advisory Board (RAB) on January 19, 2017, and

WHEREAS, the Agency Plan and its attachments were advertised in the Oregonian for public review and comment from January 21, 2017 through March 7, 2017, and

WHEREAS, the Agency Plan and its attachments were discussed and testimony was taken at a public hearing in front by the HACC Board of Commissioners on March 16, 2017, and

WHEREAS, HUD requires HACC Board approval in the form of a board resolution, and

WHEREAS, the Agency Plan and required attachments and certifications are to be submitted to the HUD at least 75 days prior to the effective date of July 1, 2017,

NOW THEREFORE BE IT RESOLVED that the Agency Plan, its attachments and its certifications are approved, and the Executive Director of the Housing Authority of Clackamas County is authorized to submit these documents to HUD.

DATED this 6<sup>th</sup> day of April, 2017

BOARD OF COMMISSIONERS OF THE HOUSING AUTHORITY OF CLACKAMAS COUNTY, OREGON

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Chair

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Recording Secretary

# **Housing Authority of Clackamas County (HACC)**

**Five Year Plan  
2017-2022**



**HACC Executive Director  
Chuck Robbins**

# Housing Authority of Clackamas County (HACC)



## 5-Year Plan 2017-2022

Effective Dates upon HUD Approval:

July 1<sup>st</sup>, 2017-June 30<sup>th</sup> 2022

**Housing Authority of Clackamas County (HACC)**

**2017-2022 Five Year Plan**

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<b>5-Year PHA Plan (for All PHAs)</b>	<b>U.S. Department of Housing and Urban Development Office of Public and Indian Housing</b>	<b>OMB No. 2577-0226 Expires: 02/29/2016</b>
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**Purpose.** The 5-Year and Annual PHA Plans provide a ready source for interested parties to locate basic PHA policies, rules, and requirements concerning the PHA's operations, programs, and services, and informs HUD, families served by the PHA, and members of the public of the PHA's mission, goals and objectives for serving the needs of low- income, very low- income, and extremely low- income families

**Applicability.** Form HUD-50075-5Y is to be completed once every 5 PHA fiscal years by all PHAs.

<b>A.</b>	<b>PHA Information.</b>																				
A.1	<p><b>PHA Name:</b> <u>Housing Authority of Clackamas County</u> <b>PHA Code:</b> <u>OR001</u></p> <p><b>PHA Plan for Fiscal Year Beginning:</b> (MM/YYYY): <u>07/2017</u>  <b>PHA Plan Submission Type:</b> <input checked="" type="checkbox"/> 5-Year Plan Submission <input type="checkbox"/> Revised 5-Year Plan Submission</p> <p><b>Availability of Information.</b> In addition to the items listed in this form, PHAs must have the elements listed below readily available to the public. A PHA must identify the specific location(s) where the proposed PHA Plan, PHA Plan Elements, and all information relevant to the public hearing and proposed PHA Plan are available for inspection by the public. Additionally, the PHA must provide information on how the public may reasonably obtain additional information on the PHA policies contained in the standard Annual Plan, but excluded from their streamlined submissions. At a minimum, PHAs must post PHA Plans, including updates, at each Asset Management Project (AMP) and main office or central office of the PHA. PHAs are strongly encouraged to post complete PHA Plans on their official websites. PHAs are also encouraged to provide each resident council a copy of their PHA Plans.</p> <p><b>PHA Plan, PHA Plan Elements, and Public Hearing Information can be found at the following locations:</b></p> <ol style="list-style-type: none"> <li>1) Housing Authority Administrative Office, 13930 S Gain Street, Oregon City, OR 97045</li> <li>2) Housing Authority Clackamas Heights Property Management Office, 13900 S Gain Street, Oregon City, OR 97045</li> <li>3) Housing Authority Hillside Property Management Office, 2889 Hillside Court, Milwaukie, OR 97222</li> <li>4) Housing Authority Website: <a href="http://www.clackamas.us/hacc">http://www.clackamas.us/hacc</a> under Plans and Reports</li> <li>5) Clackamas County Public Library located at 16201 S.E. McLoughlin, Oak Grove, OR 97222</li> <li>6) Resident Advisory Boards Members receive a hard copy of the draft Annual Plan</li> </ol> <p><input type="checkbox"/> PHA Consortia: (Check box if submitting a Joint PHA Plan and complete table below)</p> <table border="1" data-bbox="246 1209 1507 1549"> <thead> <tr> <th rowspan="2">Participating PHAs</th> <th rowspan="2">PHA Code</th> <th rowspan="2">Program(s) in the Consortia</th> <th rowspan="2">Program(s) not in the Consortia</th> <th colspan="2">No. of Units in Each Program</th> </tr> <tr> <th>PH</th> <th>HCV</th> </tr> </thead> <tbody> <tr> <td>Lead PHA:</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Participating PHAs	PHA Code	Program(s) in the Consortia	Program(s) not in the Consortia	No. of Units in Each Program		PH	HCV	Lead PHA:											
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Lead PHA:																					
<b>B.</b>	<b>5-Year Plan.</b> Required for <u>all</u> PHAs completing this form.																				
B.1	<p><b>Mission.</b> State the PHA's mission for serving the needs of low- income, very low- income, and extremely low- income families in the PHA's jurisdiction for the next five years.</p> <p>The Housing Authority of Clackamas County's (HACC's) mission is to provide affordable, safe, decent and sanitary housing opportunities in a fiscally responsible manner to low-income people in Clackamas County.</p>																				

**B.2**

**Goals and Objectives.** Identify the PHA's quantifiable goals and objectives that will enable the PHA to serve the needs of low- income, very low-income, and extremely low- income families for the next five years.

PHA Goal 1: Develop new housing units with long-term affordability for a broad range of low-income households with an emphasis on dispersal of affordable housing by:

- Apply for additional rental voucher, as appropriate
- Leverage private or other public funds to create additional housing opportunities
- Acquire land for new construction of affordable housing
- Study financial feasibility of potential acquisition and rehabilitation of existing multi-family properties
- Prepare and submit Rental Administration Demonstration (RAD) application for the rehabilitation of Hillside Manor
- Study the financial feasibility of redevelopment of or disposal of Hillside Park, Oregon City View Manor, and Clackamas Heights
- Evaluate the utilization of RAD or Demolition/Disposition Section 18 to improve and increase the number of affordable housing units
- May engage in mixed-finance development activities for Affordable Housing, as needed
- Submit a Section 18 Demo/Disposition application, if feasible, for Oregon City View Manor, Clackamas Heights and Scattered Sites

The following Development Objectives were approved by the HACC Board as part of the repositioning of the Housing Authority:

- 4 to 1 replacement of any Public Housing unit sold or demolished
- Long term physical and financial sustainability of HACC (Construction of new affordable units that generate \$500,000/year of new Operating Revenue)
- Decentralization of low income housing
- Develop housing that increases access to community services (e.g. social services, health care, transportation, youth programs, adult education & job training)
- Increase the number of units that would be available to households at or below 30% of Area Median Income
- Minimize relocation costs

PHA Goal 2: Improve access & housing choice for everyone, with a focus on protected classes and single parent households by (FH):

- Provide voucher mobility counseling
- Conduct outreach efforts to potential voucher landlords
- Convert Public Housing to vouchers through development projects, as appropriate and available
- Revise payment standards, as needed
- Maintain security deposit loan program for Section 8 families
- Provide higher payment standards for families needing ADA units.
- Survey and Maintain a list of ADA units within the County to assist families seeking housing
- Release a Request for Proposals for project based vouchers and Public Housing proceeds to encourage new affordable housing development.

PHA Goal 3: Enforce Fair Housing Laws and Increase public understanding of Fair Housing laws by:

- Host free Fair Housing trainings
- Partner with Fair Housing council of Oregon for information distribution
- Continue to partner with Clackamas County's Housing Rights & Resources Program
- Offer training at Metro Multifamily and other Landlord Group Meetings on the Benefits of Rental Assistance
- Distribute Fair Housing Videos and Information to landlords participating in Section 8
- Orient client's on their Fair Housing Rights & provide Fair Housing brochures
- Attend State subcommittee meetings on Renters Rights and other nonprofit Renter Rights Advocacy Meetings

PHA Goal 4: Improve the quality of Housing Authority assisted housing and customer service by:

- Maintain high performer status
- Improve welcoming environment
- Streamline administrative operations, alleviating staff time to improve customer service
- Renovate or modernize public housing units
- Demolish or dispose of obsolete public housing, as appropriate
- Provide replacement Public Housing and/or Vouchers
- Develop strategy for cross training staff to ensure we provide the highest level of service to clients we serve

PHA Goal 5: Improve community quality of life and economic vitality by:

- Partner with social service agencies to provide services for youth to succeed in school
- Designate developments for particular residents groups (elderly, persons with disabilities), as needed
- Develop stronger working relationships with service providers who assist our residents who are elderly and/or disabled
- Continue to grow the community gardens
- Encourage Resident participation through Resident Associations

PHA Goal 6: Promote self-sufficiency and asset development of families and individuals by:

- Continue to partner with local & regional workforce partners to increase the number of employed and under-employed persons in assisted housing
- Partner with agencies to provide supportive services to increase independence for the elderly and families with disabilities
- Apply for new Resident Opportunities Self Sufficiency grant
- Apply for new Family Self Sufficiency grant
- Research and apply for future grants that provide services and enhance residents' quality of life

<p><b>B.3</b></p>	<p><b>Progress Report.</b> Include a report on the progress the PHA has made in meeting the goals and objectives described in the previous 5-Year Plan.  <b>HUD Strategic Goal: Increase the availability of decent, safe, and affordable housing.</b></p> <p>PHA Goal: Expand the supply of assisted housing by:  <input checked="" type="checkbox"/> Applied for additional rental vouchers: acquired 30 new VASH vouchers, applied for set aside NOFA and Family Unification NOFA but we were not awarded.  <input checked="" type="checkbox"/> Reduced public housing vacancies: maintained 98% or greater occupancy.  <input checked="" type="checkbox"/> Leveraged private or other public funds to create additional housing opportunities: in progress PEDCOR development of Rosewood Terrace (212 units). Leveraging approximately \$54 million in bonds and tax credit equity. HACC awarded 20 project based vouchers and \$1,100,000 in disposition funds.  <input checked="" type="checkbox"/> HACC provided \$1,300,000 in disposition funds and 21 project based vouchers for Town Center Courtyards (TCC), a 60 unit development with drug and alcohol free housing. TCC completed construction and began leasing in August 2016.</p> <p>PHA Goal: Improve the quality of assisted housing by:  <input checked="" type="checkbox"/> Maintain High Performer Status in public housing management  <input checked="" type="checkbox"/> Reached High Performer Status in voucher management  <input checked="" type="checkbox"/> Developed system for collecting customer satisfaction  <input checked="" type="checkbox"/> Focused on efforts to improve specific management functions: converted to geographic inspections, self-certification of repairs, including photos of inspections, paperless scanning and attaching of documents  <input checked="" type="checkbox"/> Modernized 10 public housing units</p> <p>PHA Goal: Increase assisted housing choices by:  <input checked="" type="checkbox"/> Provided voucher mobility counseling during move orientations  <input checked="" type="checkbox"/> Conducted outreach efforts to potential voucher landlords in partnership with Fair Housing Council  <input checked="" type="checkbox"/> Partnered with a Fair Housing attorney and hosted free trainings for landlords and staff  <input checked="" type="checkbox"/> Successfully submitted regional rent study with area Housing Authorities' to increase voucher payment standards  <input checked="" type="checkbox"/> Received grant funds and are in the process of implementing a security deposit assistance loan program</p> <p><b>HUD Strategic Goal: Improve community quality of life and economic vitality</b></p> <p>PHA Goal: Provide an improved living environment  <input checked="" type="checkbox"/> Strengthened relationships with service providers who assist our elderly and/or disabled clients  <input checked="" type="checkbox"/> Implemented public housing security improvements, security cameras and onsite security company  <input checked="" type="checkbox"/> Improved the office lobbies by updating paint and furniture  <input checked="" type="checkbox"/> Increased resident communication of services through lobby electronic reader board  <input checked="" type="checkbox"/> Partnered with non-profit organizations for youth activities, camps and mentorships  <input checked="" type="checkbox"/> Partnered with Public Health to provide on-site nurse for health education and prevention of Public Housing clients.  <input checked="" type="checkbox"/> Added half time case manager from Social Services organization, working with at-risk residents  <input checked="" type="checkbox"/> Partnered with non-profit organization to provide formerly homeless families furniture and household goods</p> <p><b>HUD Strategic Goal: Promote self-sufficiency and asset development of families and individuals</b></p> <p>PHA Goal: Promote self-sufficiency and asset development of assisted households  <input checked="" type="checkbox"/> Entered into a Memorandum of Understanding with workforce agency to provide services to increase the number of employed persons in assisted housing  <input checked="" type="checkbox"/> Coordinated supportive services around workforce education to improve clients' employability  <input checked="" type="checkbox"/> Coordinated workforce services to increase independence for the elderly or families with disabilities  <input checked="" type="checkbox"/> Partnered with the Workforce agency and Community Development agency to provide tenant based rental assistance for ten (10) families who participate in Reboot NW and are in need of assistance with rent while in the program.</p> <p><b>HUD Strategic Goal: Ensure Equal Opportunity in Housing for all Americans</b></p> <p>PHA Goal: Ensure equal opportunity and affirmatively further fair housing  <input checked="" type="checkbox"/> Participate in the County's Housing Advisory Board (HAB)  <input checked="" type="checkbox"/> Partnered with Community Development to create the new 5-Year Assessment of Fair Housing Plan. The Assessment of Fair Housing was approved by HUD and is effective 7/1/2017 – 6/30/2022.  <input checked="" type="checkbox"/> Aligned five-year Plan with Community Development's 5-year Consolidated Plan</p>
<p><b>B.4</b></p>	<p><b>Violence Against Women Act (VAWA) Goals.</b> Provide a statement of the PHA's goals, activities objectives, policies, or programs that will enable the PHA to serve the needs of child and adult victims of domestic violence, dating violence, sexual assault, or stalking.</p> <p><b>See Attachment D: VAWA Statement</b></p>

<p><b>B.5</b></p>	<p><b>Significant Amendment or Modification.</b> Provide a statement on the criteria used for determining a significant amendment or modification to the 5-Year Plan.</p> <p><b>See Attachment E</b> Discretionary changes (changes which are not mandated by regulation) in the plans or policies of HACC, which fundamentally change the mission, goals, objectives, or plans of the agency and which require formal approval of the Board of Housing Authority Commissioners. Discretionary changes include Capital Fund items that have a total expense in excess of \$250,000 in any single grant year.</p>
<p><b>B.6</b></p>	<p><b>Resident Advisory Board (RAB) Comments.</b></p> <p>(a) Did the RAB(s) provide comments to the 5-Year PHA Plan? Y <input type="checkbox"/> N <input checked="" type="checkbox"/></p> <p>(b) If yes, comments must be submitted by the PHA as an attachment to the 5-Year PHA Plan. PHAs must also include a narrative describing their analysis of the RAB recommendations and the decisions made on these recommendations. <b>See Attachment F</b></p>
<p><b>B.7</b></p>	<p><b>Certification by State or Local Officials.</b></p> <p><a href="#">Form HUD 50077-SL</a>, <i>Certification by State or Local Officials of PHA Plans Consistency with the Consolidated Plan</i>, must be submitted by the PHA as an electronic attachment to the PHA Plan. <b>See Attachment L</b></p>

## Instructions for Preparation of Form HUD-50075-5Y 5-Year PHA Plan for All PHAs

### A. PHA Information [24 CFR §903.23\(4\)\(c\)](#)

**A.1** Include the full **PHA Name**, **PHA Code**, **PHA Fiscal Year Beginning** (MM/YYYY), **PHA Plan Submission Type**, and the **Availability of Information**, specific location(s) of all information relevant to the hearing and proposed PHA Plan.

**PHA Consortia:** Check box if submitting a Joint PHA Plan and complete the table.

### B. 5-Year Plan.

**B.1 Mission.** State the PHA’s mission for serving the needs of low- income, very low- income, and extremely low- income families in the PHA’s jurisdiction for the next five years. ([24 CFR §903.6\(a\)\(1\)](#))

**B.2 Goals and Objectives.** Identify the PHA’s quantifiable goals and objectives that will enable the PHA to serve the needs of low- income, very low- income, and extremely low- income families for the next five years. ([24 CFR §903.6\(b\)\(1\)](#)) For Qualified PHAs only, if at any time a PHA proposes to take units offline for modernization, then that action requires a significant amendment to the PHA’s 5-Year Plan.

**B.3 Progress Report.** Include a report on the progress the PHA has made in meeting the goals and objectives described in the previous 5-Year Plan. ([24 CFR §903.6\(b\)\(2\)](#))

**B.4 Violence Against Women Act (VAWA) Goals.** Provide a statement of the PHA’s goals, activities objectives, policies, or programs that will enable the PHA to serve the needs of child and adult victims of domestic violence, dating violence, sexual assault, or stalking. ([24 CFR §903.6\(a\)\(3\)](#))

**B.5 Significant Amendment or Modification.** Provide a statement on the criteria used for determining a significant amendment or modification to the 5-Year Plan.

#### B.6 Resident Advisory Board (RAB) comments.

(a) Did the public or RAB provide comments?

(b) If yes, submit comments as an attachment to the Plan and describe the analysis of the comments and the PHA’s decision made on these recommendations. ([24 CFR §903.17\(a\)](#), [24 CFR §903.19](#))

This information collection is authorized by Section 511 of the Quality Housing and Work Responsibility Act, which added a new section 5A to the U.S. Housing Act of 1937, as amended, which introduced the 5-Year PHA Plan. The 5-Year PHA Plan provides the PHA’s mission, goals and objectives for serving the needs of low- income, very low- income, and extremely low- income families and the progress made in meeting the goals and objectives described in the previous 5-Year Plan.

Public reporting burden for this information collection is estimated to average .76 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. HUD may not collect this information, and respondents are not required to complete this form, unless it displays a currently valid OMB Control Number.

**Privacy Act Notice.** The United States Department of Housing and Urban Development is authorized to solicit the information requested in this form by virtue of Title 12, U.S. Code, Section 1701 et seq., and regulations promulgated thereunder at Title 12, Code of Federal Regulations. Responses to the collection of information are required to obtain a benefit or to retain a benefit. The information requested does not lend itself to confidentiality.



**ATTACHMENT A**

**Summary of Housing Choice Voucher Administrative Plan Policy Changes effective July 1, 2017**

<b>New Policy</b>	<b>Explanation of Proposed New Policy Language</b>	<b>Chapter</b>
<b><i>Code of Conduct</i></b>	Employees must report any personal relationship with an applicant or tenant receiving assistance to the Program Manager. Personal relationship defined as Employees with a relationship cannot handle any aspect of the applicant or tenant process.	<b>1</b>
<b><i>Screening Criteria increased allowable offenses from 4 to 9 without a hearing.</i></b>	Applicants' criminal background history for the most recent 5 years will be scored based on severity of convictions. Scoring will be 1-4 with 4 being the highest level of risk crimes. Applicants who have combined score 3 and under will be approved. Applicants with a score 4 - 9 can be approved by a manager taking into consideration factors discussed in Section 3-III.E. Applicants with a score greater than 9 are denied.	<b>3</b>
<b><i>Local Preferences</i></b>	Families applying from outside of Clackamas County must live in Clackamas County one (1) year with the voucher before being allowed to transfer (port out). <b>Preference will be given to residents of Clackamas County who are elderly, disabled, or displaced single person families over other single person families.</b>	<b>4</b>
<b><i>Local Preferences</i></b>	No more than 10 families per year that meet HUD's definition of chronically homeless <u>and</u> disabled that have completed an intake and been referred by the Clackamas County Coordinated Housing Access line formed as part of the Clackamas County Continuum of Care. The family must at time of application provide proof of disability and chronic homelessness status by having a case manager, counselor, mentor, or other professional verify this status. The family must only meet the chronically homeless criteria at time of application.	<b>4</b>
<b><i>If insufficient funding, rescinded vouchers</i></b>	Category 2: All Port Vouchers for which a 52665 has not been received. Vouchers will be rescinded in order of the date and time were issued, starting with the most recently issued vouchers.	<b>5</b>
<b><i>Voucher Extensions</i></b>	If HACC has inadequate funding or faces a sequestration, no extensions will be granted.	<b>5</b>

	<b>Bedroom Definition</b>	For a room to be considered as a bedroom, it must meet the minimum definition as established by HUD. This includes, but is not limited to, the following: A room primarily designed for sleeping with a source of natural light, a minimum of which, 50% shall be openable, a minimum horizontal dimension of 7ft, a minimum height of 7'6", code complying means of emergency egress (2 ways to get out in a fire, usually implies a window and a door), an outlet with overhead permanent light fixture or two outlets, a permanent source of heat somewhere with the house that is adequate to heat all spaces, operable window, security, and a minimum of 70 square feet. Water heaters must be in a closet or enclosed if it exists in the space. Bedrooms cannot exist in a utility area. In addition, HACC's policy states that bedrooms in units built after 1940 will include closets built into the wall units. Rooms that have been remodeled will qualify as bedrooms as long as the remodel has included the addition of a closet and window easement. HACC may use tax information to determine total number of bedrooms in the unit.	<b>8</b>
	<b>Initial Inspection</b>	At initial inspection of a vacant unit, the presence of the owner and a family representative is permitted, but is not required.	<b>8</b>
	<b>Initial Inspection</b>	HACC may schedule an inspection more than 30 days after the original date for good cause or reasonable accommodation.	<b>8</b>
	<b>Project Based Voucher Rent Limits</b>	<p>HACC's goal is to provide as many families with vouchers as possible. Given the budget limitations of the program, HACC must implement policies that control its HAP expenditures.</p> <p>The rent to owner including utility allowances must not exceed the lowest of:</p> <ul style="list-style-type: none"> <li>• An amount determined by HACC <ul style="list-style-type: none"> <li>○ For general PBV's an amount not to exceed the HhhhHHigh HOME Rent Limit; or</li> <li>○ For PBV's with HACC Disposition funds, an amount not to exceed HACC Payment standards</li> </ul> </li> <li>• The reasonable rent; or</li> <li>• The rent requested by the owner.</li> </ul>	<b>17</b>

	<b><i>TBRA – HOME Tenant Based Rental Assistance Program</i></b>	Program is discontinuing due to funding Ends July 1, 2017	<b>18</b>
	<b><i>Shelter Plus Care</i></b>	Move Policy put in place that allows clients to move outside of the Continuum of Care jurisdiction in cases of Domestic Violence and for Reasonable Accommodation. Moves limited to locations where HACC has a reciprocal agreement for inspections.	<b>18</b>

## ATTACHMENT B

### Summary of Admissions and Continuing Occupancy Policy Changes effective July 1, 2017

New Policy Issue & Citation	Explanation of Proposed Policy and Revised Language	Chapter
<p>1. Number of references – Resources Used to Check Applicant Suitability as a Tenant [PH Occ GB, pp. 47-56] ACOP page: 3-26</p>	<ul style="list-style-type: none"> <li>• ACOP doesn't state how many personal references are needed. Currently we are requesting four (4). This information is stated on the "Character References" form that is giving to clients. Under the section "Past Performance.....". ACOP will be amended to state:               <ul style="list-style-type: none"> <li>○ "At least three (3) references from either landlords, employers, or other third parties not related to the applicant dating back to five years."</li> </ul> </li> </ul>	<p><b>3</b></p>
<p>2. Security Deposits [24 CFR 966.4(b)(5)] - ACOP page: 8-6</p>	<ul style="list-style-type: none"> <li>• Compared to other Housing Authorities HACC's rental deposit amounts are extremely low therefore deposits will be increased effective upon approval of PHA Plan. Even if client rent is \$0, tenants will still require to pay the full Security Deposit amount. The new deposit amounts will be as follows:               <ul style="list-style-type: none"> <li>○ 1 Bedroom = \$200</li> <li>○ 2 Bedroom = \$300</li> <li>○ 3 Bedroom = \$400</li> <li>○ 4 Bedroom = \$500</li> </ul> </li> </ul>	<p><b>3</b></p>
<p>3. 4-II.B. Organization of the Waiting List – ACOP Page: 4-6</p>	<ul style="list-style-type: none"> <li>• Insert language: "If family composition changes while an applicant is on the waiting list and they report such changes as required by the program they may have the option to switch to a list for which they are eligible for."</li> </ul>	<p><b>4</b></p>

<p>4. Good news letter – 4-III.C. Notification of Selection – Page: 4-20</p>	<ul style="list-style-type: none"> <li>• ACOP does not state how many days the client has to respond to the letter before being filed inactive. However, the letter we mail to them, states that they need to contact us within fifteen (15) days. In order to expedite the lease up process applicants will be required to respond within eight (8) business days of receiving their Good Newsletter. Insert <ul style="list-style-type: none"> <li>○ “Applicants shall respond to HACC within eight calendar days of the date of the Good News letter.”</li> </ul> </li> </ul>	<p style="text-align: center;">4</p>
<p>5. 5-I-B. <b>Determining Unit Size</b> – ACOP page: 5-2</p>	<ul style="list-style-type: none"> <li>• The ACOP states that “HACC will assign one bedroom for each two persons within the household except in the following circumstances...” Under this section the following revisions will be inserted: <ul style="list-style-type: none"> <li>○ Persons of the opposite sex (other than spouses, and children under age 5) will not be required to share a bedroom. <u>This clause will be stricken.</u></li> <li>○ Persons of different generations will not be required to share a bedroom. <u>This clause will be stricken.</u></li> </ul> </li> <li>• The following policies will be added to this section of the ACOP <ul style="list-style-type: none"> <li>○ A family that consists of a pregnant woman (with no other persons) must be treated as a two-person family.</li> <li>○ A single head of household parent shall not be required to share a bedroom with his/her child (although they may do so at the request of the family.</li> <li>○ A separate bedroom will be allocated for a single head of household with children. The two person per bedroom will be required thereafter regardless of gender or age of children.</li> <li>○ HACC will strive to ensure that families or individuals are not over or under-housed through utilizing the transfer list.</li> </ul> </li> </ul>	<p style="text-align: center;">5</p>

## **Attachment C**

### **Strategy for Addressing Housing Needs**

#### **Introduction**

The Housing Authority of Clackamas County (HACC) is committed to affirmatively furthering fair housing and contributing to the elimination of impediments to fair housing choice as described in 24 CFR Part 570.601 and the Furthering Fair Housing Executive Order 11063, as amended by Executive Order 12259.

Clackamas County Housing and Community Division (HCD) with local Fair Housing Partners participating in a Regional Fair Housing Collaboration and completed a Fair Housing Plan. HCD is comprised of HACC and Community Development (CD)

#### **LOCAL EFFORTS**

HCD assembled its Fair Housing Partners to identify goals and strategies to improve housing choices in Clackamas County. HCD's Fair Housing local partners include; cities, towns and hamlets in Clackamas County, Clackamas County Social Services Division (SSD), Clackamas County Department of Transportation and Development (DTD), the Fair Housing Council of Oregon (FHCO) and Legal Aid Services of Oregon (LASO).

Six (6) general fair housing goals were identified:

- Goal I: Develop new housing units with long-term affordability for a broad range of low-income households with an emphasis on dispersal of affordable housing
- Goal II: Increase accessibility to affordable housing for person with disabilities and single parent familial status households (households with children under 18 yrs)
- Goal III: Improve access to housing and services for all protected classes
- Goal IV: Enforce Fair Housing laws and increase public understanding of Fair Housing laws
- Goal V: Coordinate Fair Housing advocacy and enforcement efforts among regional partners
- Goal VI: Ensure that all housing in Clackamas County is healthy and habitable

#### **REGIONAL EFFORTS**

Clackamas County continues to meet quarterly with regional partners to coordinate fair housing efforts, data collection, training and events. Regional partners include: Multnomah County, Washington County, Clark County (WA), City of Portland, City of Gresham, and the City of Beaverton. In addition, there are several agencies that provide fair housing service in the county, including the United States Department of Housing and Urban Development, The Fair Housing Council of Oregon, Legal Aid Services of Oregon and Clackamas County Social Services Division, Housing Rights and Resources Program.

Regional partners intend to move to a regional Analysis of Impediments to Fair Housing study and regional data collection in order to plan more effective training events and strategies to reduce housing discrimination and increase housing choice for residents in the Portland metropolitan area housing market. Regional partners are also working to align their fair housing efforts with the public housing authorities' plans to increase access to housing.

#### **Statewide Goals of the Fair Housing Council of Oregon:**

The Fair Housing Council of Oregon (FHCO) has contracts with the state of Oregon and with several local governments to provide fair housing training to tenants and landlords. FHCO has assembled a group of fair housing partners to coordinate fair housing activities, training and events. The first meeting was held on May 6, 2014 to discuss needs for education and outreach, audit testing needs (to find out if landlords are discriminating against protected classes of people) and, other identified by local agencies. FHCO is also being asked by partners to collect and analyze housing discrimination data to report out to partners.

## Attachment C

### Strategy for Addressing Housing Needs

#### Oregon state laws have changed to prohibit source of income in Section 8

Effective July 1, 2014, landlords cannot refuse to rent to an applicant, or treat an applicant or tenant differently, because the applicant is using a Section 8 voucher or other local, state, or federal rental housing assistance. Nor can landlords advertise “no Section 8.” Landlords can still screen and reject any applicant, including those with a Section 8 voucher, for past conduct and ability to pay rent.

Prior to passage of House Bill 2639 in 2013, the “source of income” category explicitly excluded federal rent assistance, which primarily refers to the Section 8 Housing Choice Voucher program; this exclusion meant that Oregon landlords could refuse to rent to applicants, or even to consider them, just because they had a Section 8 voucher. The new law removed that exception and explicitly stated that Section 8 or any other local, state, or federal housing assistance is included in the source of income protection. Oregon Revised Statute 659A.421 (1) (d).

The new law also creates the Housing Choice Landlord Guarantee Program, to compensate landlords for damages incurred as a result of tenancies by Section 8 voucher holders.

#### Clackamas County Actions Taken in 2015-2016 and Analysis of Impact

Strategy	Primary Partners (Lead in <b>BOLD</b> )	Accomplishments
<b>Commit to countywide and regional support to continue and enhance enforcement of fair housing laws</b>	<b>SSD</b> HACC CD	SSD has annual contracts with the Fair Housing Council of Oregon FHCO (\$10,770) and Legal Aid Services of Oregon (LASO) (\$81,250) to provide enforcement of fair housing laws. FHCO assisted 209 people with housing information. 31 (15%) were Latino and 12 (6%) were African American. CD is meeting regularly with regional partners to discuss audit testing options.
<b>Improve access to fair housing information</b>	SSD <b>CD</b> HACC	HCD has met with regional partners and the Fair Housing Council of Oregon to coordinate Fair Housing activities, develop a centralized resource and to develop fair housing materials in multiple languages and formats.
<b>Expand opportunities for tenants using Housing Choice Vouchers</b>	<b>HACC</b>	The Housing Authority of Clackamas County has landlord outreach materials posted on the HACC website: <a href="http://www.clackamas.us/housingauthority/">http://www.clackamas.us/housingauthority/</a> 2015-2016 Landlord Training Events: February 28 <sup>th</sup> , 2016- Oregon Landlord Tenant Law June 8 <sup>th</sup> , 2016 – Fair Housing Laws  Outreach for all of these events were done by the following: <ul style="list-style-type: none"> <li>• Direct email invitations to our landlord email list</li> <li>• Announcements on the Metro Multi Family Calendar of events</li> <li>• Fair Housing Council of Oregon Announcements</li> <li>• Promoted on HACC Website</li> <li>• Word of mouth through property management companies, etc</li> </ul> <p><b>Landlord Newsletters</b> continue to be distributed and posted on HACC’s website.</p>

**Attachment C  
Strategy for Addressing Housing Needs**

<b>Ensure the HACC conducts targeted outreach to underrepresented &amp; protected class for upcoming waitlist opening</b>	<b>HACC</b>	HACC is opening its waitlists in January and plans to add 500 new applicants to Housing Choice Voucher Section 8 waitlist and 3,300 to its Site Based Public Housing waitlists.
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**Housing Needs.**

Based on information provided by the applicable Consolidated Plan, information provided by HUD, and other generally available data, make a reasonable effort to identify the housing needs of the low-income, very low-income, and extremely low-income families who reside in the jurisdiction served by the PHA, including elderly families, families with disabilities, and households of various races and ethnic groups, and other families who are on the public housing and Section 8 tenant-based assistance waiting lists. The identification of housing needs must address issues of affordability, supply, quality, accessibility, size of units, and location.

<b>Housing Needs of Families on the Waiting List: Housing Choice Voucher and Public Housing</b>		
	<b># of Families</b>	<b>% of Total Families</b>
Waiting List Total	1,177	100%
Section 8 Waiting List	706	65.7%
Public Housing Waiting List	471	34.3%
Extremely Low Income <= 30% of AMI	984	84%
Very Low Income <= 50% of AMI	163	21.1%
Low Income <= 80% of AMI	25	5.2%
Above 80% of AMI	3	.2%
Elderly or Near Elderly	365	33.3%
Non-Elderly	1,016	85.1%
Disabled Head of Household	384	34%
White	894	77.6%
Black/African American	196	15.5%
American Indian/Alaska Native	39	3.6%
Asian	25	2.3%
Native Hawaiian/Pacific Island	10	.9%
Hispanic	81	7.5%
Non-Hispanic	993	92.5%
<b>Characteristics by Bedroom Size</b>		
0 BR (Section 8 only)	77	7.2%
1 BR	316	29.4%
2 BR	355	33.1%
3 BR	261	24.3%
4 BR	60	5.6%
5 BR (Section 8 only)	4	.4%
6 BR (Section 8 only)	1	.1%



ATTACHMENT D

**Violence Against Women (VAWA) Statement**

Housing Authority of Clackamas County (HACC) addresses VAWA in the Section 8 Housing Choice Voucher Administrative Plan and the Public Housing Admissions and Continued Occupancy Policy. The responsibility of not terminating families from housing for reasons that fall under the VAWA regulation is particularly addressed. We conduct emergency transfers for victims of domestic violence in our housing programs.

We offer a local preference in the Housing Choice Voucher program for victims of Domestic Violence working with case management. We partner with several community partners like Los Niños Cuentan, Clackamas Women’s Services, A Safe Place and Northwest Housing Alternatives to administer the Domestic Violence preference vouchers.

In addition, we are in continuous contact with County and City agencies, including the various law enforcement agencies, for current tenant’s experiencing Domestic Violence.

HACC also partners with Clackamas County Social Services and Behavioral health as well as the State Department of Human Services to use funds in a transitional housing program and Shelter + Care program under the Continuum of Care, where many victims of Domestic Violence are housed and provided services.

In summary, we follow the VAWA program policies and regulations with the goal of providing safeguards for the families falling under the VAWA related program requirements and refer households, as needed, to local domestic violence service provider partners. HACC has amended all its policies to comply with VAWA.



\_\_\_\_\_  
Chuck Robbins, Executive Director

2/27/17

\_\_\_\_\_  
Date

ATTACHMENT E

January 12, 2017

2017-2022 Five Year Plan

CFP Submission Statement of Significant Amendment

Significant Amendment and Substantial Deviation/Modification. Provide the PHA's definition of "significant amendment" and "substantial deviation/modification":

*Discretionary changes (changes which are not mandated by regulation) in the plans or policies of the HACC which fundamentally change the mission, goals, objectives, or plans of the agency and which require formal approval of the Board of Housing Authority Commissioners. Discretionary changes include Capital Fund items that have a total expense in excess of \$250,000 in any single grant year.*

Sincerely,



Chuck Robbins  
Executive Director

## Attachment F

### **PUBLIC NOTICE**

A Public Meeting to cover the Housing Authority of Clackamas County's (HACC) Draft Five Year Plan effective 2017-2022 will be held on January 19th, 2017, at 10 AM at the OCVM Community Center, located at 200 S. Longview Wy., Oregon City, OR 97045. Resident Advisory Board members and Public Housing residents are encouraged to attend.

A public hearing to comment on HACC's 2017 Draft Plan will be held on March 16th, 2017, before the HACC's Board of Commissioners. The Commissioners meet at 6:00 PM, in their hearing room at the Public Services Building located at 2051 Kaen Road, Oregon City, Oregon. Everyone is welcomed to attend and comment on the proposed Plan.

HACC developed its Plan in compliance with the Quality Housing and Work Responsibility Act of 1998 and Federal Register, Docket No. FR-4829-N-01.

The Draft Plan will be available for review from January 21st, 2017-March 7th, 2017 and can be found online at <http://www.clackamas.us/housingauthority/plansandreports.html>. Hard copies are kept for public review at HACC's administrative office located at 13930 South Gain Street, Oregon City, OR, HACC's Property Mgmt Offices at 13900 South Gain Street, Oregon City, or HACC's Hillside Office at 2889 S.E. Hillside Ct, Milwaukie, OR. HACC's Property Management offices are open Monday through Thursday, 10-12PM & 1-5PM and the Administrative Building is open Monday through Thursday, 8:30AM to 6PM. The Plan can also be viewed at the Clackamas County Library, 16201 SE McLoughlin, Oak Grove, OR.

Written comments should be directed to Elizabeth Miller, Housing Authority of Clackamas County, P.O. Box 1510, Oregon City, OR 97045, or by email at [emiller@clackamas.us](mailto:emiller@clackamas.us). These comments must be received by March 7th, 2017.



ATTACHMENT G

## HACC FIVE YEAR PLAN 2017-2022

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### RESIDENT ADVISORY BOARD MEETING MINUTES

**HACC Staff Present:**

Toni Karter  
Rich Malloy  
Allison Coe  
Sonja Souder  
Julie Garland  
Gary Knepper

**Taking Notes:** Hillary Westlake

Jason Kirkpatrick  
Elizabeth Miller  
Craig Beals  
Jemila Hart  
Josh Teigen  
April Bundy  
Linda Keener

**Residents Present:**

Erik Wilkin  
Mike Fogle  
Mickie Moreland  
Shirley Shanton  
Marge Lockhart

Kryss Longwell  
Eric Wilkin  
Joel Johansen  
Sue Philips  
Ann Leenster

**10:00-10:20** Welcome, Introductions and Agency Overview

Jason Kirkpatrick

Jason Kirkpatrick is standing in while Chuck Robbins is out due to an injury. This 5 year plan we are discussing today will be in effect from July 2017 through June 2022. Resident Advisory is required.

**10:20-11:00** Capital Fund Overview: Attachment E-H

Josh Teigen

Please see insert for budget details. It was a productive year for capital fund projects. We completed several projects. Took a couple of year's worth of funding to complete several units which included: 6 scattered sites, 2 units at Clackamas Heights, and 2 units at Oregon City View Manor. The outdated heating system in the Maintenance Building was updated. The Modernization project (these sites need new windows and siding and roofing) will start in 2017. AMP stands for Asset Management Program. Flooring contract will last for 2 years, and will be used as needed. Fair Housing did an audit and we had a few compliant issues, and we will be correcting those. Fees cover consulting, testing, and needs that require engineer. On demand contracts, reissue every 2 years, i.e. testing services. Relocation contract, a new contract will be issued, old one expired a couple months ago. Hillside needs a couple of upgrades, depends on prices. The operations budget covers day to day operations of agency. We are audited every year and can charge for that. Side work is anything that is outside of the building. HUD allows us to be a certain amount of money back into our tools, necessities for the work crew. Non dwelling renovations go towards Housing Authority buildings that aren't dwellings. 45 million dollars of work estimated that we need to perform. Capital Funds have gone down due to Federal funding year to year. 5 year plan is basically the annual times five.

Resident Questions:

Q: Did rent go up due to all of this work?

A: No. Federal funding is why rent increases.

Q: If Housing Authority sells the properties in the future, will relocation costs be covered for residents?

A: Yes. We are required to take care of the residents.

Q: Do we have reserve amount for budgeting?

A: Yes, that is not listed in the budget.

Q: Will housing properties be rebuilt instead of continually putting money into the old buildings?

A: We have been looking in to converting Hillside Park in the next five years. HUD owns our property, not Housing Authority. We have strict guidelines with the funding we receive, we are looking at what options are available to us, for examples, Section 18 and RAD.

Q: If funds aren't used what happens?

A: They go back, we lose them. We have 2 years to get 90% completed, and 4 years to complete projects.

Q: Are wages included in budget?

A: Yes, labor and maintenance.

Q: Will all roofs be metal?

A: No, they are too costly to install.

Q: Can we turn away a new roof if we feel the current condition is fine?

A: It is up to the property manager, but more than likely if we are installing a new roof the unit needs a new roof.

Q: Are people that are on HUD treated better than Section 8? Repairs aren't getting completed by private landlords.

A: We are the property managers for Public Housing so we have more control, Section 8 we have no control over. Check into Housing, Rights and Resources on renter's rights.

Q: Does Josh create the Budget?

A: Property Managers and Josh complete the budget.

Q: Is money set aside for yard work? How can resident have the lawn mowed more often?

A: As budget cuts happen we have to prioritize work. We used to have interns in summer, which that program was cut, and the interns would mow lawns.

Q: Can mowing lawns work towards community service?

A: No, because of the liability and we are an agency not a community.

**11:00-11:30** HCV (S8) Updates - Review Attachment A

Toni Karter

Changes that the Federal Government allows us to have a choice over are listed in the portfolio. Changes that have taken place and the Federal Government demands are not listed. We will be more lenient when it comes to the Criminal Background Checks unless you manufactured Meth or are a Sex Offender. As for other charges (over 9 points), if you can prove that you have recovered and continue to live a straight life, you are given an opportunity for a hearing. Everyone is screened the same way in the applicant process. Due to sheer volume of applicants, we will have a local preference (depends on address). Anyone who is homeless can call the Coordinated Housing homeless hotline with the County, they are then added to a general County waitlist that prioritizes families based on vulnerability. The Housing Authority will give 10 vouchers to those who are the waitlist that come off the Coordinated Housing wait list (to the most vulnerable people). Those who are preferences (i.e. Veterans), can still be added to our waitlist even when it is closed to others. Individuals who are Domestic Violence victims are eligible to receive one of the 15 vouchers we give out each year.

With facing a new administration, the forecast isn't great, we may face cuts to funding. Therefore we are updating our rescission policy. With this policy, the people who are out looking and not yet leased up will be rescinded and put back on the wait list. Then, people who are living outside of our County, if their County won't help absorb the voucher, we will cut them.

Also, people who have been here longer are not elderly or disabled will get cut prior to someone new who is elderly and disabled. Voucher extensions will be limited to only those for reasonable accommodation. That means if you are out looking and your voucher expires you will lose it. More bedrooms a unit has means they can charge more. A bedroom needs to be proper, have proper heating, structurally sound. We have a lot of landlords that are dragging heels on doing repairs, policy is, when they do initial inspection they have 30 days to make corrections. Congress just passed a new policy, they have 180 days to make repairs, and during this time tenant can move in if the Housing Authority wishes to adopt this policy. At this time HACC is still contemplating the policy. In project based units we will be capping the top dollar so it doesn't continue increasing. If a person is in the Reboot Tenant Based Rental Assistance (TBRA) program with Clackamas Community College, they had received rent assistance for one year, unfortunately that program is now ending July 1, 2017. Shelter plus Care, gives us money to supply families who are homeless, it used to be that they could only live in Clackamas County. Then they changed it to be anywhere. We are setting up a move policy, they will need to stay unless a disability or domestic violence reason, but even that will be limited to Multnomah County or a jurisdiction that is willing to commit to absorbing them in advance due to the inspection requirements.

Resident Questions:

Q: If my property is charging \$1600 for 3 bedrooms are they allowed to keep increasing it?

A: Yes, if you can't afford it, your option is moving.

Q: How long are vouchers good for?

A: As long as the family needs it but they only get 90 days to search for housing.

Q: Can my daughter and her family be added to my household?

A: Not if she is 18 or older, have her apply for waitlist. Wait list open January 23-29.

Q: How did we get other county residents?

A: Porting. When they can't find anything in their county, they come to us.

Q: How do we find out about crimes on current tenants?

A: We receive police reports on tenants as well as neighbors may let us know if there has been illegal activity.

Q: Can we let someone use our address?

A: In Public Housing that is against your lease, they can go to the post office and get a general delivery (they will hold your mail for up to a month), or get a PO box (\$30 for 6 months). When looking into fraud that wouldn't look good for tenant. Lastly, some organizations let you use their address (Father's Heart).

**11:30 – 12:00** Break for Lunch

**12:00-12:30** Public Housing Updates: Attachment B

Rich Malloy

There are admission changes to our occupancy policy. Historically, we have tried to get several references for employment, character, and landlord. Now, we are striving for 3 solid references. Security deposits haven't been changed for a long time and are low, they are now increasing (doesn't affect current tenants). It isn't unusual for changes to happen while an applicant is on the waitlist, now we will be transferring those applicants onto appropriate waitlist if they keep us informed. It is important that you are on the list you are eligible for. We are simplifying our occupancy standards, we reference HUD for their guidelines and our occupancy standard will be two to a room plus one (with exceptions). Applicants now have 8 calendar days to notify us that they are interested in an offered unit. Public Housing has guidelines to follow on how quick they turn units and we lose points with HUD if it takes too long. There have been other changes by HUD that we have implemented as well. Our ACOP is available online, and updated every year. Lastly, Rich mentioned that the County Commissioners are wanting to provide alternatives or affordable housing in the County.



Resident Questions:

Q: If applicant has two teenage children; one female, one male, do they have to share rooms?

A: We don't tell people how to use the unit, we are just supply you the unit you are eligible for.

Q: Do we need to notify HACC if someone is staying with them.

A: More communication is better than less. Yes, you need to let us know if they will be there longer than 21 days.

**12:30-12:40** Annual Plan Review: Goals & Objectives

Elizabeth Miller

We are aligning with Community Development Consolidated Plan, Fair Housing Plan (we were one of 10 counties who were able to take part in a pilot) in creating The Housing Authority's plan. As part of the Fair Housing Plan we identified 6 goals for the County. The biggest one is improving the lack of affordable housing. We will be looking at partners, land, and looking at our own properties and our options. We want to use the area more efficiently. RAD stands for Rental Assistance Demonstration, which is what we are considering obtaining to remodel Hillside Manor and develop Hillside Park.

If something isn't included in the 5 year program we will have to amend it and it becomes a mess, so ideally everything needs to be listed in the 5 year plan. Processes always involve residents and take a while. Chuck has already brought the development objectives in front of the commissioners. For every one unit we terminate we will develop four. Improving access to everyone is another goal. We will continue to provide the voucher mobility. In the security deposit program, the lender provides for up to \$1000. This applies for households who have an income; they can't discriminate based on credit, and household will need to pay lender back at a later time. We host a couple of Fair Housing trainings per year and partner with an attorney. The Housing Authority is reaching out to landlord groups to better educate on our Section 8 program. Our client feedback survey is implemented, asking for either negative or positive comments. Public Housing sends the surveys out on an annual basis, Section 8 sends them out during each tenant's annual exam. Our last score with HUD 91/92, and minimum is 90. We are continually trying to improve our offices and make environments more welcoming to clients. We have staff that have been with us for a long time and others that are newer, we are working on cross training. We encourage participation with tenants in meetings like today and the community garden. Looking at various grants for more opportunities or to provide current opportunities long term.

Resident Questions:

Q: What is Section 18?

A: Housing Authority sold some of its scattered sites programs. They took proceeds from that sale and invested it in a new property. RAD is different, it is where we rehabilitate the building. The only tools we have to develop properties are Section 18 or RAD.

Q: If my husband took out grant to go to college, do we need to report it?

A: Yes. It may affect rent, depends on full time/part time student and if includes rent assistance.

Q: Were there any new projects purchased with the scatter site proceeds.

A: Yes.

**12:40-12:50** Annual Plan Review: Progress Report

Toni Karter

See Portfolio. VASH vouchers are Veteran vouchers. The Housing Authority increased from 20 to 51 VASH Vouchers. As mentioned in the portfolio, Rosewood Terrace (212 units), would be in the general area behind Walmart by Clackamas Town Center; and would have accessibility to Transit. The Town Center Courtyards (ICC) is family housing for those recovering from drug and alcohol addiction. In the past, staff would complete inspections based on someone's annual, which took up a

lot of driving time. Now, inspections are assigned based upon region. We will also be decreasing the amount of inspections we complete, we will be doing one every 24 months as long as they have proven to pass (versus every year). In the past two years we have partnered with community agencies to provide training/education and services. Other citizens are waiting on the waitlist for trainings/services while they are assisting our clients first. We have taken on the education role to help landlords not practice discriminatory housing, but it does still exist. The Housing Authority is using resources wisely due to lack of funds. We continue to communicate to clients when there are free health/dental clinics. If clients have email addresses that they supply to us we will contact them with information on resources and we are sending our newsletters via email to save on postage. If you don't have email access at home you can use the computers at local libraries or computers at our community sites. Clackamas County isn't very diverse racially, we are doing more to outreach to all Americans. Lastly, we updated our policies to Violence Against Women based on Federal guidelines (perpetrator has to be evicted, not victim).

Resident Questions:

Q: Does the new inspection calendar apply at OCVM. A: No, only applies to Section 8 tenants.

**12:50-12:55** Annual Plan Timeline

Elizabeth Miller

Annual Plan is due to HUD by April 17<sup>th</sup>, 2017. Send questions or comments to Elizabeth Miller, her contact information is on the front of the portfolio.

**12:55-1pm** Questions and Answers

All

Waitlist Opening:

January 23-29<sup>th</sup>. Log into our website to access more information and apply. Use the tools to see what you are eligible for. You can apply for Section 8 and/or Public Housing. If you don't have a computer, come to one of our offices and a staff member will assist you, or you can visit a public library and use one of their computers. We are adding 3500 applicants to Public Housing and 500 applicants to Section 8.

Resident Questions:

Q: What is the average wait time?

A: 5-8 years Section 8, Public Housing can be up to 5 years, the list for Public Housing has gotten very short.

Q: Do we have variety in bedroom sizes?

A: Yes, we have units with 1-4 bedrooms.

Q: Will other counties will be opening their waitlists?

A: They have various opening dates depending on location.

Q: What waitlist moves the fastest?

A: Hillside Manor one bedroom is the fastest moving list.

Q: Is there any preferences for Veterans?

A: Yes, waitlist might be closed to everyone else but open to Vets if they are homeless or disabled.

Q: If resident knows people that are looking for a place to stay, why can't they share their unit with them?

A: It creates family to be under housed, or over occupied. We can't double up two families into one unit. The more people in a unit the more damage tends to occur, parking becomes an issue too. That would create roommate situations, and who gets the ultimate rights when something goes sour. Once they move in, everyone has equal rights.

Q: Can we add a family member to our household?

A: If minor, yes, if they are staying more than 51% time with you.



Q: Now that we are changing the household composition policy, what are we going to do with those who are on transfer list?  
A: It shouldn't change too much, shouldn't have adverse effect, they are guidelines and they may vary household to household.

Q: What are Fair Housing laws?

A: A person is a person and they have a right to housing, no matter sex, race, disability, etc. If non-citizen, we charge them (prorated) full rent, they don't get excluded.

Resident suggested organization called Love, Inc., they provide many services including bikes.

Attachment H

Housing Authority of Clackamas County  
2017 Capital Fund Budget Summary

	2016 Physical Needs Assessment	Physical Needs Hard Cost Total	Clackamas Heights AMP 1	Hillside Park AMP 3	Oregon City View Manor AMP 4	Hillside Manor AMP 5	Scattered Sites AMP 2	Admin/ Maintenance Buildings	Community Centers/ Laundry	Non-Dwelling Space
	Physical Needs Assessment	\$ 33,835,317	\$ 7,860,195	\$ 6,751,208	\$ 6,245,589	\$ 6,608,732	\$ 4,759,891	\$ 937,100	\$ 92,602	\$ 580,000
	Physical Needs Assessment (Over 20 years)	\$ 44,958,033	\$ 11,629,148	\$ 9,689,180	\$ 8,447,987	\$ 8,756,260	\$ 6,435,458			
	Cost per unit per year (Over 20 years)		\$ 116,291	\$ 96,892	\$ 84,480	\$ 87,563	\$ 44,691			
<b>Acct #</b>	<b>2015 Capital Fund Budget</b>	<b>Total Budgeted Costs</b>								
1406	HA-Wide Operations (20% Max)	\$ 173,500								
1408	HA-Wide Management Improvement	\$ -								
	Administration (10% Max w/o in house A&E)									
1410	Central Office, Capital Fund admin and audit	\$ 86,750								
1410	CFP Capital Improvement Coordinator A&E design work	\$ 45,200								
1411	Audit	\$ 6,500								
	PHA Wide Fees and Costs									
1430	Architectural, engineering, consulting; mold asbestos testing & remediation, other related expenses	\$ 35,000								
	PHA Wide Site Improvements									
1450	Paving, fencing, landscape, garden, utilities, 504 accomodation	\$ 62,250								
	PHA Wide Dwelling Improvement									
1460	Cabinets, doors, plumbing, HVAC, siding windows, roofs, kitchens, porches, patios, 504 accomodations	\$ 407,500								
	PHA Wide Dwelling Equipment									
1465	Ranges and refrigerators	\$ -								
	PHA Wide Non-Dwelling Equipment									
1475	Tools, equipment, furnishings, vehicles, Office equipment	\$ 46,890								
1495	Relocation Costs	\$ 10,000								
	Asset Managed Properties - specific projects									
1450	Site Work (concrete, drive, walks, landscape, drainage	\$ -								
1460	Dwelling Renovation (Bath, Kitchen, Cabinets, Flooring etc.)	\$ -								
1460	Energy Improvements per Energy Audit	\$ -								
1470	Non-Dwelling Renovation (flooring, HVAC, windows, siding, cabinets, paint, etc.)	\$ 7,500								
	<b>Grand Total Capital Fund Budget</b>	<b>\$ 881,090</b>								

ATTACHMENT H

January 12, 2017

**2016 Capital Fund Completed Projects**

- Project #15002 – Modernization of 10 Dwelling Units - \$684,757.00
- Project # 15007 – AMP Wide Flooring (On Demand) - \$92,908.00
- Project # 16003 – Operations Shop HVAC Upgrade - \$8,480.00
- Project # 16004 – AMP Wide Cabinet Replacement Project - \$75,000.00. On demand two year contract.

**2017 Proposed Capital Fund Projects**

- Modernization project - \$350,000.00
- AMP Wide Flooring Contract - \$200,000.00
- Fair Housing Project - \$75,000.00
- Asbestos Air Monitoring - \$25,000.00
- Asbestos Abatement Services - \$50,000.00
- Relocations Contract - \$25,000.00
- Hillside Manor Upgrades - \$100,000.00

*Healthy Families. Strong Communities.*

P.O. Box 1510, 13930 S. Gain Street, Oregon City, OR, 97045-0510 • Phone (503) 655-8267 • Fax (503) 655-8676

**Part I: Summary**

<b>PHA Name:</b> Housing Authority of Clackamas County	<b>Grant Type and Number</b> Capital Fund Program Grant No: <b>OR16P00150117</b> Date of CFFP:	Replacement Housing Factor Grant No: <b>FFY of Grant Approval:</b>	<b>FFY of Grant: 2017</b>
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<b>Type of Grant</b> <input checked="" type="checkbox"/> <b>Original Annual Statement</b> <input type="checkbox"/> <b>Reserve for Disasters/Emergencies</b> <input type="checkbox"/> <b>Revised Annual Statement (revision no: )</b> <input type="checkbox"/> <b>Performance and Evaluation Report for Period Ending:</b> <input type="checkbox"/> <b>Final Performance and Evaluation Report</b>
---

Line	Summary by Development Account	Total Estimated Cost		Total Actual Cost <sup>1</sup>	
		Original	Revised <sup>2</sup>	Obligated	Expended
1	Total Non-CFP Funds	\$ -	\$ -	\$ -	\$ -
2	1406 Operations (may not exceed 20% of line 20) <sup>3</sup>	\$ 173,500.00	\$ -	\$ -	\$ -
3	1408 Management Improvements	\$ -	\$ -	\$ -	\$ -
4	1410 Administration (may not exceed 10% of line 20)	\$ 131,950.00	\$ -	\$ -	\$ -
5	1411 Audit	\$ 6,500.00	\$ -	\$ -	\$ -
6	1415 Liquidated Damages	\$ -	\$ -	\$ -	\$ -
7	1430 Fees and Costs	\$ 35,000.00	\$ -	\$ -	\$ -
8	1440 Site Acquisition	\$ -	\$ -	\$ -	\$ -
9	1450 Site Improvement	\$ 62,250.00	\$ -	\$ -	\$ -
10	1460 Dwelling Structures	\$ 407,500.00	\$ -	\$ -	\$ -
11	1465.1 Dwelling Equipment - Nonexpendable	\$ -	\$ -	\$ -	\$ -
12	1470 Nondwelling Structures	\$ 7,500.00	\$ -	\$ -	\$ -
13	1475 Nondwelling Equipment	\$ 46,890.00	\$ -	\$ -	\$ -
14	1485 Demolition	\$ -	\$ -	\$ -	\$ -
15	1492 Moving to Work Demonstration	\$ -	\$ -	\$ -	\$ -
16	1495.1 Relocation Costs	\$ 10,000.00	\$ -	\$ -	\$ -
17	1499 Development Activities <sup>4</sup>	\$ -	\$ -	\$ -	\$ -
18a	1501 Collateralization of 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)	\$ 881,090.00	\$ -	\$ -	\$ -
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	\$ 10,000.00	\$ -	\$ -	\$ -

<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> PHA's with under 250 units in management may use 100% of CFP Grants for operations.  
<sup>4</sup> RHF funds shall be included here.

<b>Part I: Summary</b>				
<b>PHA Name:</b> Housing Authority of Clackamas County		<b>Grant Type and Number</b> Capital Fund Program Grant No: <b>OR16P00150117</b> Replacement Housing Factor Grant No: Date of CFFP:		<b>FFY of Grant: 2017</b> <b>FFY of Grant Approval:</b>
<b>Type of Grant</b> <input checked="" type="checkbox"/> <b>Original Annual Statement</b> <input type="checkbox"/> <b>Reserve for Disasters/Emergencies</b> <input type="checkbox"/> <b>Revised Annual Statement (revision no:    )</b> <input type="checkbox"/> <b>Performance and Evaluation Report for Period Ending:</b> <input type="checkbox"/> <b>Final Performance and Evaluation Report</b>				
<b>Line</b>	<b>Summary by Development Account</b>	<b>Total Estimated Cost</b>		<b>Total Actual Cost:</b>
		<b>Original</b>	<b>Revised:</b>	<b>Obligated</b> <b>Expended</b>
<b>Signature of Executive Director</b>		<b>Date</b>	<b>Signature of Public Housing Director</b> <b>Date</b>	

<b>Part II: Supporting Pages</b>								
<b>PHA Name:</b> Housing Authority of Clackamas County		<b>Grant Type and Number</b> Capital Fund Program Grant No: <b>OR16P00150117</b> CFFP (Yes/No:) Replacement Housing Factor Grant No:				<b>Federal FY of Grant:</b> <b>2017</b>		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Development Account No.	Qty	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised <sup>1</sup>	Funds Obligated <sup>2</sup>	Funds Expended <sup>2</sup>	
<b>AMP-wide Operations</b>	1. Operations	1406	1	\$173,500.00	\$0.00	\$0.00	\$0.00	
	<b>SUB-TOTAL</b>	<b>1406</b>		<b>\$173,500.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
<b>AMP-wide Mgmt. Improve.</b>	1. STAFF: Resident Services Salary & Benefits	1408	100%	\$0.00	\$0.00	\$0.00	\$0.00	
	2. STAFF: Asset Manager Salary & Benefits	1408	5%	\$0.00	\$0.00	\$0.00	\$0.00	
	3. STAFF: Youth Services Salary & Benefits/Activities/Contracts	1408	1	\$0.00	\$0.00	\$0.00	\$0.00	
	4. STAFF: Service Coordinator Salary & Benefits	1408	1	\$0.00	\$0.00	\$0.00	\$0.00	
	5. TRAINING: Staff Training Improvement	1408	1	\$0.00	\$0.00	\$0.00	\$0.00	
	6. Travel for Resident Services Specialist(s)	1408	1	\$0.00	\$0.00	\$0.00	\$0.00	
	7. Software: Operating Systems & Office Software - Soft Costs	1408	1	\$0.00	\$0.00	\$0.00	\$0.00	
	8. TRAINING: Resident Training related to Agency Plan resident partnership process	1408	1	\$0.00	\$0.00	\$0.00	\$0.00	
	<b>SUB-TOTAL</b>	<b>1408</b>		<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
<b>AMP-wide Admin.</b>	1. Central Office Cost Center (COCC) Salary & Benefits	1410	100%	\$86,750.00	\$0.00	\$0.00	\$0.00	
	2. CFP Capital Improvement Specialist Salary & Benefits - A&E Design Work	1410	35%	\$45,200.00	\$0.00	\$0.00	\$0.00	In-house A&E work exempted from 10% max Admin costs per - 968.112 (n) (2) (ii)
	<b>SUB-TOTAL</b>	<b>1410</b>		<b>\$131,950.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
<b>Audit</b>	1. Financial Audit	1411	100%	\$6,500.00	\$0.00	\$0.00	\$0.00	
	<b>SUB-TOTAL</b>	<b>1411</b>		<b>\$6,500.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
<b>AMP-wide Fees &amp; Costs</b>	1. Architectural, Engineering, Consulting Services	1430	1	\$20,000.00	\$0.00	\$0.00	\$0.00	
	2. Asbestos/Mold Testing/Remediation: Dev. 001 - 021	1430	1	\$15,000.00	\$0.00	\$0.00	\$0.00	
	3. Printing RFP's, Bid documents, other project related expenses	1430	50	\$0.00	\$0.00	\$0.00	\$0.00	
	<b>SUB-TOTAL</b>	<b>1430</b>		<b>\$35,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	

<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**

PHA Name: Housing Authority of Clackamas County		Grant Type and Number Capital Fund Program Grant No: <b>OR16P00150117</b> CFFP (Yes/No): Replacement Housing Factor Grant No:					Federal FY of Grant: <b>2017</b>	
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Development Account No.	Qty	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised <sup>1</sup>	Funds Obligated <sup>2</sup>	Funds Expended <sup>2</sup>	
<b>AMP-wide Site Improve.</b>	1. PHA-Wide Sitework, site paving, fencing, landscaping, site utilities at vacancy and 504 Accessibility Accommodations	1450	25	\$0.00	\$0.00	\$0.00	\$0.00	CFP Modernization at vacancy or at accommodation request - AMP to be determined at vacancy or upon accommodation request and modernization to be completed in phases
	<b>SUB-TOTAL</b>	<b>1450</b>		<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
<b>AMP-wide Dwelling Improve.</b>	1. PHA-Wide Dwelling Improvements to include cabinets, flooring, doors, garage doors, plumbing, HVAC, siding, chimney removal, windows, roofs, kitchens, attached porches and patios at vacancy, and 504 Accessibility Accommodations	1460	10	\$0.00	\$0.00	\$0.00	\$0.00	CFP Modernization at vacancy or at accommodation request - AMP to be determined at vacancy or upon accommodation request and modernization to be completed in phases
	<b>SUB-TOTAL</b>	<b>1460</b>		<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
<b>AMP-wide Dwelling Equipment</b>	1. Ranges & Refrigerators	1465	0	\$0.00	\$0.00	\$0.00	\$0.00	
	<b>SUB-TOTAL</b>	<b>1465</b>		<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
<b>AMP-I Non Dwelling Structures</b>	Community Center Dwelling	1470			\$0.00	\$0.00	\$0.00	
	a. Dwelling Renovation (Flooring, HVAC, Windows, Siding, Cabinets, Paint, etc.)	1470	1	\$7,500.00	\$0.00	\$0.00	\$0.00	
	<b>SUB-TOTAL</b>	<b>1470</b>		<b>\$7,500.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
<b>PHA-wide Non-Dwelling Equipment</b>	1. Computers & Equipment	1475	2	\$5,000.00	\$0.00	\$0.00	\$0.00	
	2. Maintenance Vehicles & Equip	1475	1	\$41,890.00	\$0.00	\$0.00	\$0.00	
	3. Copier	1475		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>SUB-TOTAL</b>	<b>1475</b>		<b>\$46,890.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
<b>PHA-wide Relocation Costs</b>	1. Relocation costs due to modernization activities	1495	25	\$10,000.00	\$0.00	\$0.00	\$0.00	
	<b>SUB-TOTAL</b>	<b>1495</b>		<b>\$10,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
	<b>Asset Management Properties (AMP)</b>							
<b>AMP 1 - DEV 001 Clackamas Heights</b>	1. SITEWORK	1450						
	a. Site Renovation (conc. drive, walkway, landscape, site drainage, etc.)	1450	1	\$0.00	\$0.00	\$0.00	\$0.00	
	<b>DEV #001 1450 SUB TOTAL</b>	<b>1450</b>		<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
	1. DWELLING STRUCTURES	1460						
	a. Dwelling Renovation (Bath, Kitchen, Cabinets, Flooring, etc.)	1460	1	\$20,000.00	\$0.00	\$0.00	\$0.00	
	b. Energy Improvements per Energy Audit (Water, Insulation, Heating, etc.)	1460	1	\$0.00	\$0.00	\$0.00	\$0.00	
	<b>DEV #001 1460 SUB TOTAL</b>	<b>1460</b>		<b>\$20,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
	<b>DEV #001 TOTAL</b>			<b>\$20,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	

<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**

PHA Name: Housing Authority of Clackamas County		Grant Type and Number Capital Fund Program Grant No: <b>OR16P00150117</b> CFFP (Yes/No): Replacement Housing Factor Grant No:					Federal FY of Grant: <b>2017</b>	
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Development Account No.	Qty	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised <sup>1</sup>	Funds Obligated <sup>2</sup>	Funds Expended <sup>2</sup>	
AMP 3 - DEV  003 Hillside Park	1. SITEWORK	1450						
	a. Site Renovation (conc. drive, walkway, landscape, site drainage, etc.)	1450	1	\$0.00	\$0.00	\$0.00	\$0.00	
	<b>DEV #003 1450 SUB TOTAL</b>	<b>1450</b>		<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
	1. DWELLING STRUCTURES	1460						
	a. Dwelling Renovation (Bath, Kitchen, Cabinets, Flooring, etc.)	1460	1	\$15,000.00	\$0.00	\$0.00	\$0.00	
	b. Energy Improvements per Energy Audit (Water, Insulation, Heating, etc.)	1460	1	\$0.00	\$0.00	\$0.00	\$0.00	
	<b>DEV #003 1460 SUB TOTAL</b>	<b>1460</b>		<b>\$15,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
	<b>DEV #003 TOTAL</b>			<b>\$15,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
AMP 4 - DEV  004 Oregon City  View Manor	1. SITEWORK	1450						
	a. Site Renovation (conc. drive, walkway, landscape, site drainage, etc.)	1450	1	\$0.00	\$0.00	\$0.00	\$0.00	
	<b>DEV #004 1450 SUB TOTAL</b>	<b>1450</b>		<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
	1. DWELLING STRUCTURES	1460						
	a. Dwelling Renovation (Bath, Kitchen, Cabinets, Flooring, etc.)	1460	1	\$15,000.00	\$0.00	\$0.00	\$0.00	
	b. Energy Improvements per Energy Audit (Water, Insulation, Heating, etc.)	1460	1	\$0.00	\$0.00	\$0.00	\$0.00	
	<b>DEV #004 1460 SUB TOTAL</b>	<b>1460</b>		<b>\$15,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
	<b>DEV #004 TOTAL</b>			<b>\$15,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
AMP 5 - DEV  005 Hillside  Manor	1. SITEWORK	1450						
	a. Site Renovation (conc. drive, walkway, landscape, site drainage, etc.)	1450	1	\$15,000.00	\$0.00	\$0.00	\$0.00	
	<b>DEV #005 1450 SUB TOTAL</b>	<b>1450</b>		<b>\$15,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
	1. DWELLING STRUCTURES	1460						
	a. Dwelling Renovation (Bath, Kitchen, Cabinets, Flooring, etc.)	1460	1	\$15,000.00	\$0.00	\$0.00	\$0.00	
	b. Energy Improvements per Energy Audit (Water, Insulation, Heating, etc.)	1460	1	\$0.00	\$0.00	\$0.00	\$0.00	
	<b>DEV #005 1460 SUB TOTAL</b>	<b>1460</b>		<b>\$15,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
	<b>DEV #005 TOTAL</b>			<b>\$30,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
AMP 2 - DEV  007 Scattered  Sites	1. SITEWORK	1450						
	a. Site Renovation (conc. drive, walkway, landscape, site drainage, etc.)	1450	1	\$12,500.00	\$0.00	\$0.00	\$0.00	
	<b>DEV #007 1450 SUB TOTAL</b>	<b>1450</b>		<b>\$12,500.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
	1. DWELLING STRUCTURES	1460						
	a. Dwelling Renovation (Bath, Kitchen, Cabinets, Flooring, etc.)	1460	1	\$50,000.00	\$0.00	\$0.00	\$0.00	
	b. Energy Improvements per Energy Audit (Water, Insulation, Heating, etc.)	1460	1	\$2,500.00	\$0.00	\$0.00	\$0.00	
	<b>DEV #007 1460 SUB TOTAL</b>	<b>1460</b>		<b>\$52,500.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
	<b>DEV #007 TOTAL</b>			<b>\$65,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	

<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**

PHA Name: Housing Authority of Clackamas County		Grant Type and Number Capital Fund Program Grant No: <b>OR16P00150117</b> CFFP (Yes/No): Replacement Housing Factor Grant No:				Federal FY of Grant: <b>2017</b>		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Development Account No.	Qty	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised <sup>1</sup>	Funds Obligated <sup>2</sup>	Funds Expended <sup>2</sup>	
<b>AMP 8 - DEV 008 Scattered Sites</b>	1. SITEWORK	1450						
	a. Site Renovation (conc. drive, walkway, landscape, site drainage, etc.)	1450	1	\$0.00	\$0.00	\$0.00	\$0.00	
	<b>DEV #008 1450 SUB TOTAL</b>	<b>1450</b>		<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
	1. DWELLING STRUCTURES	1460						
	a. Dwelling Renovation (Bath, Kitchen, Cabinets, Flooring, etc.)	1460	1	\$40,000.00	\$0.00	\$0.00	\$0.00	
	b. Energy Improvements per Energy Audit (Water, Insulation, Heating, etc.)	1460	1	\$0.00	\$0.00	\$0.00	\$0.00	
	<b>DEV #008 1460 SUB TOTAL</b>	<b>1460</b>		<b>\$40,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
<b>DEV #008 TOTAL</b>			<b>\$40,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>		
<b>AMP 2 - DEV 010 Scattered Sites</b>	a. Site Renovation (conc. drive, walkway, landscape, site drainage, etc.)	1450		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>DEV #010 1450 SUB TOTAL</b>	<b>1450</b>		<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
	1. DWELLING STRUCTURES	1460						
	a. Dwelling Renovation (Bath, Kitchen, Cabinets, Flooring, etc.)	1460	1	\$50,000.00	\$0.00	\$0.00	\$0.00	
	b. Energy Improvements per Energy Audit (Water, Insulation, Heating, etc.)	1460	1	\$2,500.00	\$0.00	\$0.00	\$0.00	
	<b>DEV #010 1460 SUB TOTAL</b>	<b>1460</b>		<b>\$52,500.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
	<b>DEV #010 TOTAL</b>			<b>\$52,500.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
<b>AMP 2 - DEV 012 Scattered</b>	1. SITEWORK	1450						
	a. Site Renovation (conc. drive, walkway, landscape, site drainage, etc.)	1450	1	\$22,250.00	\$0.00	\$0.00	\$0.00	
	<b>DEV #012 1450 SUB TOTAL</b>	<b>1450</b>		<b>\$22,250.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
	1. DWELLING STRUCTURES	1460						
	a. Dwelling Renovation (Bath, Kitchen, Cabinets, Flooring, etc.)	1460	1	\$60,000.00	\$0.00	\$0.00	\$0.00	
	b. Energy Improvements per Energy Audit (Water, Insulation, Heating, etc.)	1460	1	\$2,500.00	\$0.00	\$0.00	\$0.00	
	<b>DEV #012 1460 SUB TOTAL</b>	<b>1460</b>		<b>\$62,500.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
<b>DEV #012 TOTAL</b>			<b>\$84,750.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>		
<b>AMP 2 - DEV 019 Scattered</b>	a. Site Renovation (conc. drive, walkway, landscape, site drainage, etc.)	1450		\$0.00	\$0.00	\$0.00	\$0.00	
	<b>DEV #019 1450 SUB TOTAL</b>	<b>1450</b>		<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
	1. DWELLING STRUCTURES	1460						
	a. Dwelling Renovation (Bath, Kitchen, Cabinets, Flooring, etc.)	1460	1	\$50,000.00	\$0.00	\$0.00	\$0.00	
	b. Energy Improvements per Energy Audit (Water, Insulation, Heating, etc.)	1460	1	\$2,500.00	\$0.00	\$0.00	\$0.00	
	<b>DEV #019 1460 SUB TOTAL</b>	<b>1460</b>		<b>\$52,500.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
	<b>DEV #019 TOTAL</b>			<b>\$52,500.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	

<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**

PHA Name: Housing Authority of Clackamas County		Grant Type and Number Capital Fund Program Grant No: <b>OR16P00150117</b> CFFP (Yes/No): Replacement Housing Factor Grant No:				Federal FY of Grant: <b>2017</b>		
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Development Account No.	Qty	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised <sup>1</sup>	Funds Obligated <sup>2</sup>	Funds Expended <sup>2</sup>	
<b>AMP 2 - DEV 020 Scattered</b>	a. Site Renovation (conc. drive, walkway, landscape, site drainage, etc.)	1450	1	\$12,500.00	\$0.00	\$0.00	\$0.00	
	<b>DEV #020 1450 SUB TOTAL</b>	<b>1450</b>		<b>\$12,500.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
	<b>1. DWELLING STRUCTURES</b>	1460						
	a. Dwelling Renovation (Bath, Kitchen, Cabinets, Flooring, etc.)	1460	1	\$50,000.00	\$0.00	\$0.00	\$0.00	
	b. Energy Improvements per Energy Audit (Water, Insulation, Heating, etc.)	1460	1	\$2,500.00	\$0.00	\$0.00	\$0.00	
	<b>DEV #020 1460 SUB TOTAL</b>	<b>1460</b>		<b>\$52,500.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
	<b>DEV #020 TOTAL</b>			<b>\$65,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
<b>AMP 2 - DEV 021 Scattered</b>	a. Site Renovation (conc. drive, walkway, landscape, site drainage, etc.)	1450	1	\$0.00	\$0.00	\$0.00	\$0.00	
	<b>DEV #021 1450 SUB TOTAL</b>	<b>1450</b>		<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
	<b>1. DWELLING STRUCTURES</b>	1460						
	a. Dwelling Renovation (Bath, Kitchen, Cabinets, Flooring, etc.)	1460	1	\$30,000.00	\$0.00	\$0.00	\$0.00	
	b. Energy Improvements per Energy Audit (Water, Insulation, Heating, etc.)	1460	1	\$0.00	\$0.00	\$0.00	\$0.00	
	<b>DEV #021 1460 SUB TOTAL</b>	<b>1460</b>		<b>\$30,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
	<b>DEV #021 TOTAL</b>			<b>\$30,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	
<b>GRAND TOTAL</b>			<b>\$881,090.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>		

<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

<b>Part III: Supporting Pages - Management Needs Work Statement(s)</b>						
Work Statement for Year 1 FFY	Work Statement for Year: 2 FFY: 2018			Work Statement for Year: 3 FFY: 2019		
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See Annual Statement	<b>Management Improvements 1408</b>	Service Coordinator	\$ -	<b>Management Improvements 1408</b>	Service Coordinator	\$ -
		Asset Manager	\$ -		Asset Manager	\$ -
		Youth Services Coordinator	\$ -		Youth Services Coordinator	\$ -
		Travel for Resident Service Specialist	\$ -		Travel for Resident Service Specialist	\$ -
		Computer Software (Soft Costs)	\$ 2,000.00		Computer Software (Soft Costs)	\$ 2,000.00
		Computer Systems/Maint Equipment	\$ 5,000.00		Computer Systems/Maint Equipment	\$ 7,500.00
		Maint Vehicle Truck/Van/Equip	\$ 40,640.00		Maint Vehicle Truck/Van/Equip	\$ 38,840.00
		<b>Sub-Total Management Improv. - 1408</b>	<b>\$ 47,640.00</b>		<b>Sub-Total Management Improv. - 1408</b>	<b>\$ 48,340.00</b>
	<b>Administration 1410</b>	Central Office Cost Center (COCC)	\$ 86,500.00	<b>Administration 1410</b>	Central Office Cost Center (COCC)	\$ 86,500.00
		Salary & Benefits			Salary & Benefits	
	CFP Capital Improvement Coordinator			CFP Capital Improvement Coordinator		
	Salary & Benefits A&E Services	\$ 45,200.00		Salary & Benefits A&E Services	\$ 46,750.00	
	<b>Sub-Total Administration - 1410</b>	<b>\$ 131,700.00</b>		<b>Sub-Total Administration - 1410</b>	<b>\$ 133,250.00</b>	
<b>Audit 1411</b>	Financial Audit	\$ 6,500.00	<b>Audit 1411</b>	Financial Audit	\$ 6,500.00	
	<b>Sub-Total Administration - 1411</b>	<b>\$ 6,500.00</b>		<b>Sub-Total Administration - 1411</b>	<b>\$ 6,500.00</b>	
	<b>2018 Grand Total</b>	<b>\$ 185,840.00</b>		<b>2019 Grand Total</b>	<b>\$ 188,090.00</b>	

<b>Part III: Supporting Pages - Management Needs Work Statement(s)</b>							
Work Statement for Year 1 FFY	Work Statement for Year: 4 FFY: 2020			Work Statement for Year: 5 FFY: 2021			
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost	
See Annual Statement	<b>Management</b>	Service Coordinator	\$ -	<b>Management</b>	Service Coordinator	\$ -	
	<b>Improvements</b>	Asset Manager	\$ -	<b>Improvements</b>	Asset Manager	\$ -	
	<b>1408</b>	Youth Services Coordinator	\$ -	<b>1408</b>	Youth Services Coordinator	\$ -	
		Travel for Resident Service Specialist	\$ -		Travel for Resident Service Specialist	\$ -	
		Computer Software (Soft Costs)	\$ 2,000.00		Computer Software (Soft Costs)	\$ 2,000.00	
		Computer Systems/Maint Equipment	\$ 7,500.00		Computer Systems/Maint Equipment	\$ 7,500.00	
		Maint Vehicle Truck/Van/Equip	\$ 46,061.00		Maint Vehicle Truck/Van/Equip	\$ 44,486.00	
		<b>Sub-Total Management Improv. - 1408</b>	<b>\$ 55,561.00</b>		<b>Sub-Total Management Improv. - 1408</b>	<b>\$ 53,986.00</b>	
		<b>Adminstration</b>	Central Office Cost Center (COCC)	\$ 86,500.00	<b>Adminstration</b>	Central Office Cost Center (COCC)	\$ 86,500.00
		<b>1410</b>	Salary & Benefits		<b>1410</b>	Salary & Benefits	
		CFP Capital Improvement Coordinator			CFP Capital Improvement Coordinator		
		Salary & Benefits A&E Services	\$ 48,300.00		Salary & Benefits A&E Services	\$ 49,875.00	
	<b>Sub-Total Administration - 1410</b>	<b>\$ 134,800.00</b>		<b>Sub-Total Administration - 1410</b>	<b>\$ 136,375.00</b>		
	<b>Audit</b>	Financial Audit	\$ 6,500.00	<b>Audit</b>	Financial Audit	\$ 6,500.00	
	<b>1411</b>			<b>1411</b>			
	<b>Sub-Total Administration - 1411</b>	<b>\$ 6,500.00</b>		<b>Sub-Total Administration - 1411</b>	<b>\$ 6,500.00</b>		
	<b>2020 Grand Total</b>	<b>\$ 196,861.00</b>		<b>2021 Grand Total</b>	<b>\$ 196,861.00</b>		

<b>Part II: Supporting Pages - Physical Needs Work Statement(s)</b>									
Work Statement for Year 1 FFY	Work Statement for Year: 2 FFY: 2018				Work Statement for Year: 3 FFY: 2019				
	Development Name/Number	Major Work Categories	Qty	Estimated Cost	Development Name/Number	Major Work Categories	Qty	Estimated Cost	
See Annual Statement									
	<b>AMP-1,2,3,4, 5, and Scattered Sites</b>	Sitework, site paving, fencing landscaping, site utilities at vacancy and 504 Accessibility Accommodations Sitework modern. full remodel (units TBD)	5	\$ 40,000.00	<b>AMP-1,2,3,4, 5, and Scattered Sites</b>	Sitework, site paving, fencing landscaping, site utilities at vacancy and 504 Accessibility Accommodations Sitework modern. full remodel (units TBD)	5	\$ 50,000.00	
		Dwell Improve-cabinets, flooring, doors, garage doors, plumb, HVAC, siding chimney removal, windows, roofs, kitchens, attached porches and patios at vacancy, and 504 Accessibility Accommodations Dwelling modern. full remodel (units TBD)	8	\$ 436,750.00		Dwell Improve-cabinets, flooring, doors, garage doors, plumb, HVAC, siding chimney removal, windows, roofs, kitchens, attached porches and patios at vacancy, and 504 Accessibility Accommodations Dwelling modern. full remodel (units TBD)	8	\$ 414,500.00	
		<b>Sub-Total AMP-2</b>		<b>\$ 476,750.00</b>		<b>Sub-Total AMP-2</b>		<b>\$ 464,500.00</b>	
		<b>Physical Needs Subtotal</b>		<b>\$ 476,750.00</b>		<b>Physical Needs Subtotal</b>		<b>\$ 464,500.00</b>	
		<b>AMP Other</b>	A/E & Consulting	1	\$ 20,000.00	<b>AMP Other</b>	A/E & Consulting	1	\$ 20,000.00
			AMP-Wide Relocation Costs	3	\$ 10,000.00		AMP-Wide Relocation Costs	3	\$ 10,000.00
			Asbestos Testing/Abatement	5	\$ 7,500.00		Asbestos Testing/Abatement	5	\$ 12,500.00
			Mold Testing/Remediation	5	\$ 7,500.00		Mold Testing/Remediation	5	\$ 12,500.00
		<b>Sub-Total Other</b>		<b>\$ 45,000.00</b>		<b>Sub-Total Other</b>		<b>\$ 55,000.00</b>	
	<b>2017 Grand Total</b>		<b>\$ 521,750.00</b>		<b>2018 Grand Total</b>		<b>\$ 519,500.00</b>		

<b>Part II: Supporting Pages - Physical Needs Work Statement(s)</b>								
Work Statement for Year 1 FFY	Work Statement for Year: 4 FFY: 2020				Work Statement for Year: 5 FFY: 2021			
	Development Name/Number	Major Work Categories	Qty	Estimated Cost	Development Name/Number	Major Work Categories	Qty	Estimated Cost
See Annual Statement								
	<b>AMP-1,2,3,4, 5, and Scattered Sites</b>	Sitework, site paving, fencing landscaping, site utilities at vacancy and 504 Accessibility Accommodations Sitework modern. full remodel (units TBD)	5	\$ 30,000.00	<b>AMP-1,2,3,4, 5, and Scattered Sites</b>	Sitework, site paving, fencing landscaping, site utilities at vacancy and 504 Accessibility Accommodations Sitework modern. full remodel (units TBD)	5	\$ 30,000.00
		Dwell Improve-cabinets, flooring, doors, garage doors, plumb, HVAC, siding chimney removal, windows, roofs, kitchens, attached porches and patios at vacancy, and 504 Accessibility Accommodations Dwelling modern. full remodel (units TBD)	8	\$ 425,729.00		Dwell Improve-cabinets, flooring, doors, garage doors, plumb, HVAC, siding chimney removal, windows, roofs, kitchens, attached porches and patios at vacancy, and 504 Accessibility Accommodations Dwelling modern. full remodel (units TBD)	8	\$ 435,729.00
		<b>Sub-Total AMP-2</b>		<b>\$ 455,729.00</b>		<b>Sub-Total AMP-2</b>		<b>\$ 465,729.00</b>
		<b>Physical Needs Subtotal</b>		<b>\$ 455,729.00</b>		<b>Physical Needs Subtotal</b>		<b>\$ 465,729.00</b>
	<b>AMP Other</b>	A/E & Consulting	1	\$ 20,000.00	<b>AMP Other</b>	A/E & Consulting	1	\$ 20,000.00
		AMP-Wide Relocation Costs	3	\$ 10,000.00		AMP-Wide Relocation Costs	3	\$ 10,000.00
	Asbestos Testing/Abatement	5	\$ 12,500.00		Asbestos Testing/Abatement	5	\$ 7,500.00	
	Mold Testing/Remediation	5	\$ 12,500.00		Mold Testing/Remediation	5	\$ 7,500.00	
	<b>Sub-Total Other</b>		<b>\$ 55,000.00</b>		<b>Sub-Total Other</b>		<b>\$ 45,000.00</b>	
	<b>2019 Grand Total</b>		<b>\$ 510,729.00</b>		<b>2020 Grand Total</b>		<b>\$ 510,729.00</b>	

## Capital Fund Program - Five Year Action Plan

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing  
Expires 8/30/2011

<b>Part I: Summary</b>						
PHA Name/Number: <b>Housing Authority of Clackamas Co.</b>		Locality: <b>Oregon City/Clackamas/Oregon</b>			<input checked="" type="checkbox"/> Original 5-Year Plan	<input type="checkbox"/> Revision No: _____
A	Development Number and Name	Work Statement for year 1 FFY 2017	Work Statement of Year 2 FFY 2018	Work Statement of Year 3 FFY 2019	Work Statement of Year 4 FFY 2020	Work Statement of Year 5 FFY 2021
	001	<b>ANNUAL</b>	\$ -	\$ -	\$ -	
	002	<b>STATEMENT</b>	\$ 476,750.00	\$ 464,500.00	\$ 455,729.00	\$ 465,729.00
	003		\$ -	\$ -	\$ -	\$ -
	004		\$ -	\$ -	\$ -	\$ -
	005		\$ -	\$ -	\$ -	\$ -
B	Physical Improvements Subtotal			\$ 476,750.00	\$ 464,500.00	\$ 455,729.00
C	Management Improvements		\$ 47,640.00	\$ 48,340.00	\$ 55,561.00	\$ 53,986.00
D	AMP-Wide Non-dwelling Structures and Equipment		\$ -	\$ -		
E	Administration		\$ 138,200.00	\$ 139,750.00	\$ 141,300.00	\$ 142,875.00
F	Other		\$ 45,000.00	\$ 55,000.00	\$ 55,000.00	\$ 45,000.00
G	Operations		\$ 173,500.00	\$ 173,500.00	\$ 173,500.00	\$ 173,500.00
H	Demolition		\$ -	\$ -	\$ -	\$ -
I	Development		\$ -	\$ -	\$ -	\$ -
J	Capital Fund Financing Debt Service		\$ -	\$ -	\$ -	\$ -
K	Total CFP Funds		\$ 881,090.00	\$ 881,090.00	\$ 881,090.00	\$ 881,090.00
L	Total Non-CFP Funds					
M	Grand Total		\$ 881,090.00	\$ 881,090.00	\$ 881,090.00	\$ 881,090.00

**Certification by State or Local  
 Official of PHA Plans Consistency  
 with the Consolidated Plan or  
 State Consolidated Plan  
 (All PHAs)**

U. S Department of Housing and Urban Development

Office of Public and Indian Housing

OMB No. 2577-0226

Expires 2/29/2016

Attachment K

**Certification by State or Local Official of PHA Plans  
 Consistency with the Consolidated Plan or State Consolidated Plan**

I Chuck Robbins, the Executive Director  
*Official's Name*                      *Official's Title*

certify that the 5-Year PHA Plan and/or Annual PHA Plan of the

Housing Authority of Clackamas County \_\_\_\_\_  
*PHA Name*

is consistent with the Consolidated Plan or State Consolidated Plan and the Analysis of


Impediments (AI) to Fair Housing Choice of  
Clackamas County \_\_\_\_\_  
*Local Jurisdiction Name*

pursuant to 24 CFR Part 91.

Provide a description of how the PHA Plan is consistent with the Consolidated Plan or State Consolidated Plan and the AI.

The Housing Authority of Clackamas County works closely with Community Development on creating the Clackamas County's consolidated planning cycle(s) and PHA planning cycle(s) in accordance with the regulations 24 CFR part 91, for consolidated plan program participants, and 24 CFR part 903, for PHA's to jointly complete the Assessment of Fair Housing Plan.

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate. **Warning:** HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Name of Authorized Official Chuck Robbins	Title Executive Director
Signature 	Date 2/28/17



**Civil Rights Certification**  
**(Qualified PHAs)**

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing  
OMB Approval No. 2577-0226  
Expires 02/29/2016

**Civil Rights Certification**

**Annual Certification and Board Resolution**

*Acting on behalf of the Board of Commissioners of the Public Housing Agency (PHA) listed below, as its Chairman or other authorized PHA official, I approve the submission of the 5-Year PHA Plan for the PHA of which this document is a part, and make the following certification and agreements with the Department of Housing and Urban Development (HUD) in connection with the submission of the public housing program of the agency and implementation thereof:*

The PHA certifies that it will carry out the public housing program of the agency in conformity with title VI of the Civil Rights Act of 1964, the Fair Housing Act, section 504 of the Rehabilitation Act of 1973, and title II of the Americans with Disabilities Act of 1990, and will affirmatively further fair housing by examining their programs or proposed programs, identifying any impediments to fair housing choice within those program, addressing those impediments in a reasonable fashion in view of the resources available and working with local jurisdictions to implement any of the jurisdiction's initiatives to affirmatively further fair housing that require the PHA's involvement and by maintaining records reflecting these analyses and actions.

Housing Authority of Clackamas County  
PHA Name

OR001  
PHA Number/HA Code

I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate. **Warning:** HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802)

Name of Authorized Official **CHUCK ROBBINS**

Title **EXECUTIVE DIRECTOR**

Signature



Date

**2/20/17**

**Certifications of Compliance with  
PHA Plans and Related Regulations  
(Standard, Troubled, HCV-Only, and  
High Performer PHAs)**

U.S. Department of Housing and Urban Development  
Office of Public and Indian Housing  
OMB No. 2577-0226  
Expires 02/29/2016

**PHA Certifications of Compliance with the PHA Plan and Related Regulations including  
Required Civil Rights Certifications**

*Acting on behalf of the Board of Commissioners of the Public Housing Agency (PHA) listed below, as its Chairman or other authorized PHA official if there is no Board of Commissioners, I approve the submission of the X 5-Year and/or X Annual PHA Plan for the PHA fiscal year beginning 7/1/2017, hereinafter referred to as "the Plan", of which this document is a part and make the following certifications and agreements with the Department of Housing and Urban Development (HUD) in connection with the submission of the Plan and implementation thereof:*

1. The Plan is consistent with the applicable comprehensive housing affordability strategy (or any plan incorporating such strategy) for the jurisdiction in which the PHA is located.
2. The Plan contains a certification by the appropriate State or local officials that the Plan is consistent with the applicable Consolidated Plan, which includes a certification that requires the preparation of an Analysis of Impediments to Fair Housing Choice, for the PHA's jurisdiction and a description of the manner in which the PHA Plan is consistent with the applicable Consolidated Plan.
3. The PHA has established a Resident Advisory Board or Boards, the membership of which represents the residents assisted by the PHA, consulted with this Resident Advisory Board or Boards in developing the Plan, including any changes or revisions to the policies and programs identified in the Plan before they were implemented, and considered the recommendations of the RAB (24 CFR 903.13). The PHA has included in the Plan submission a copy of the recommendations made by the Resident Advisory Board or Boards and a description of the manner in which the Plan addresses these recommendations.
4. The PHA made the proposed Plan and all information relevant to the public hearing available for public inspection at least 45 days before the hearing, published a notice that a hearing would be held and conducted a hearing to discuss the Plan and invited public comment.
5. The PHA certifies that it will carry out the Plan in conformity with Title VI of the Civil Rights Act of 1964, the Fair Housing Act, section 504 of the Rehabilitation Act of 1973, and title II of the Americans with Disabilities Act of 1990.
6. The PHA will affirmatively further fair housing by examining their programs or proposed programs, identifying any impediments to fair housing choice within those programs, addressing those impediments in a reasonable fashion in view of the resources available and work with local jurisdictions to implement any of the jurisdiction's initiatives to affirmatively further fair housing that require the PHA's involvement and by maintaining records reflecting these analyses and actions.
7. For PHA Plans that includes a policy for site based waiting lists:
  - The PHA regularly submits required data to HUD's 50058 PIC/IMS Module in an accurate, complete and timely manner (as specified in PIH Notice 2010-25);
  - The system of site-based waiting lists provides for full disclosure to each applicant in the selection of the development in which to reside, including basic information about available sites; and an estimate of the period of time the applicant would likely have to wait to be admitted to units of different sizes and types at each site;
  - Adoption of a site-based waiting list would not violate any court order or settlement agreement or be inconsistent with a pending complaint brought by HUD;
  - The PHA shall take reasonable measures to assure that such a waiting list is consistent with affirmatively furthering fair housing;
  - The PHA provides for review of its site-based waiting list policy to determine if it is consistent with civil rights laws and certifications, as specified in 24 CFR part 903.7(c)(1).
8. The PHA will comply with the prohibitions against discrimination on the basis of age pursuant to the Age Discrimination Act of 1975.
9. The PHA will comply with the Architectural Barriers Act of 1968 and 24 CFR Part 41, Policies and Procedures for the Enforcement of Standards and Requirements for Accessibility by the Physically Handicapped.
10. The PHA will comply with the requirements of section 3 of the Housing and Urban Development Act of 1968, Employment Opportunities for Low-or Very-Low Income Persons, and with its implementing regulation at 24 CFR Part 135.
11. The PHA will comply with acquisition and relocation requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 and implementing regulations at 49 CFR Part 24 as applicable.



12. The PHA will take appropriate affirmative action to award contracts to minority and women's business enterprises under 24 CFR 5.105(a).
13. The PHA will provide the responsible entity or HUD any documentation that the responsible entity or HUD needs to carry out its review under the National Environmental Policy Act and other related authorities in accordance with 24 CFR Part 58 or Part 50, respectively.
14. With respect to public housing the PHA will comply with Davis-Bacon or HUD determined wage rate requirements under Section 12 of the United States Housing Act of 1937 and the Contract Work Hours and Safety Standards Act.
15. The PHA will keep records in accordance with 24 CFR 85.20 and facilitate an effective audit to determine compliance with program requirements.
16. The PHA will comply with the Lead-Based Paint Poisoning Prevention Act, the Residential Lead-Based Paint Hazard Reduction Act of 1992, and 24 CFR Part 35.
17. The PHA will comply with the policies, guidelines, and requirements of OMB Circular No. A-87 (Cost Principles for State, Local and Indian Tribal Governments), 2 CFR Part 225, and 24 CFR Part 85 (Administrative Requirements for Grants and Cooperative Agreements to State, Local and Federally Recognized Indian Tribal Governments).
18. The PHA will undertake only activities and programs covered by the Plan in a manner consistent with its Plan and will utilize covered grant funds only for activities that are approvable under the regulations and included in its Plan.
19. All attachments to the Plan have been and will continue to be available at all times and all locations that the PHA Plan is available for public inspection. All required supporting documents have been made available for public inspection along with the Plan and additional requirements at the primary business office of the PHA and at all other times and locations identified by the PHA in its PHA Plan and will continue to be made available at least at the primary business office of the PHA.
22. The PHA certifies that it is in compliance with applicable Federal statutory and regulatory requirements, including the Declaration of Trust(s).

Housing Authority of Clackamas County  
PHA Name

OR001  
PHA Number/HA Code


Annual PHA Plan for Fiscal Year 2017

5-Year PHA Plan for Fiscal Years 2017 - 2022

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I hereby certify that all the information stated herein, as well as any information provided in the accompaniment herewith, is true and accurate. **Warning:** HUD will prosecute false claims and statements. Conviction may result in criminal and/or civil penalties. (18 U.S.C. 1001, 1010, 1012; 31 U.S.C. 3729, 3802).

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Name of Authorized Official	Title
Chuck Robbins	Executive Director
Signature 	Date 2/28/17

April 6, 2017

Board of Commissioners  
Clackamas County

Presentation of  
April as Child Abuse Prevention Month

<b>Purpose/Outcomes</b>	Update the Board about the nationally recognized Child Abuse Prevention Month and highlight the collaborative work that is being done by state, county and local non-profits to prevent and address child abuse.
<b>Dollar Amount and Fiscal Impact</b>	No fiscal impact to the County – the intent is to educate and invite the community to take action in their communities to make them healthy places where children grow and thrive.
<b>Funding Source</b>	N/A
<b>Duration</b>	The month of April is dedicated to Child Abuse Prevention, but programming occurs throughout the year.
<b>Previous Board Action</b>	The Board has been very supportive of promoting Child Abuse Prevention Month and highlighting programs that serve these vulnerable children.
<b>Strategic Plan Alignment</b>	Individuals and families in need are healthy and safe Ensure safe, healthy and secure communities
<b>Contact Person</b>	Rodney A. Cook, Director for Children, Youth & Families Division 503-650-5677

**BACKGROUND:**

Preventing child abuse and neglect is a community responsibility that depends on involvement from people throughout the community. According to Children’s First for Oregon’s 2016 Status of Oregon’s Children and Families Report:

- There were a total of 662 Victims of Abuse and Neglect in Clackamas County
  - 43% - Neglect
  - 42% - Threat of Harm
  - 8% - Physical Abuse
  - 5% - Sexual Abuse
  - 2% - Mental Injury

These percentages represent a slight reduction in the overall rate of reports of abuse in 2015 from 7.8% down to 7.5% in 2016.
- In addition, a total of 642 children under the age of 18 years were in foster care at least once during the year of 2016, down from 706 in 2015.

Whether suffering neglect, harsh physical punishment, threat of harm, sexual abuse, or psychological trauma, the children who survive carry the scars of their abuse for the rest of their lives. Research shows that child abuse and neglect not only directly harm children, but also increase the likelihood of risky behaviors such as criminal activities, substance abuse, academic failure, and health problems such as heart disease and obesity.

*Healthy Families. Strong Communities.*

We know that child maltreatment most often occurs when people find themselves in stressful situations, without community resources, or knowledge of how to cope. The majority of child abuse cases stemmed from situations and conditions that are preventable when community programs and systems are engaged and supportive. A community that cares about early childhood development, parental support, and provides maternal mental health for instance, are more likely to foster nurturing families and healthy children.

We would like to recognize effective child abuse prevention programs in our community that have partnered together to create a continuum of services that support the county's goal of ensuring safe, healthy and secure communities. Successful programs and initiatives in Clackamas County include:

- A Safe Place Family Justice Center
- Clackamas Branch – Oregon Child Protective Services
- Clackamas County Early Learning Hub
- Clackamas County Sheriff's Office Child Abuse and Domestic Violence Summit
- Children of Incarcerated Parents program
- Family Stepping Stones Relief Nursery
- Healthy Families of Clackamas County, which is a home visitation program for high risk new parents.
- The Children's Center, which conducts medical assessments of children who are suspected victims of abuse or neglect.
- The Clackamas Parenting Together resource web-page.
- The Clackamas County Multi-Disciplinary Team which includes representatives from the Sheriff's Office, District Attorney, Victim Assistance, Oregon Department of Human Services and other County agencies.

We call upon all Clackamas County citizens to observe Child Abuse Prevention month by demonstrating our gratitude to those who work to keep our children safe, and by taking action in our own communities to make them healthy places for children to grow and thrive.

Respectfully submitted,

Richard Swift, Director  
Health, Housing & Human Services

April 6, 2017

Board of Commissioners  
Clackamas County

Members of the Board:

**Public Hearing on the Proposed 2017-2021 Housing and Community Development Consolidated Plan and Proposed 2017 Action Plan**

The Community Development Division of the Health, Housing & Human Services Department requests a Public Hearing before the Board of County Commissioners. This hearing will satisfy a U.S. Department of Housing and Urban Development (HUD) requirement that the public annually be given an opportunity to review the past performance of the County's Housing and Community Development programs. The hearing also provides an opportunity to review the proposed 2017-2021 Housing and Community Development Consolidated Plan and the Proposed 2017 Housing and Community Development Action Plan.

The two plans determine how funds from the Community Development Block Grant (CDBG), Home Investment Partnership (HOME), and Emergency Solutions Grant (ESG) programs will be allocated in coming years.

The Proposed 2017-2021 Consolidated Plan will become the basis for the County's annual applications under the three grant programs. The Proposed Action Plan consists of projects selected for funding in the first year of the 2017-2019 Three Year Project Summary. It is the result of a public involvement process which began in October of 2016 and will be completed at the end of a 30-day public comment period on April 17, 2017.

Submission of grant application materials will enable the County to receive approximately \$1,998,889 in CDBG funds, \$712,517 in HOME funds, and \$170,959 in ESG funds during the 2017 program year. These are estimated funding levels which will be revised once HUD publishes the final federal allocation amounts. The application for funding will not be submitted until these amounts are finalized by HUD.

The hearing is scheduled to be held during the BCC meeting at 10:00 a.m., April 6, 2017, and will consist of three parts:

- 1) A review by the Director, Chuck Robbins, of the past performance of the County's Housing and Community Development programs;
- 2) A review of the Proposed 2017-2021 Housing and Community Development Consolidated Plan and the Proposed 2017 Housing and Community Development Action Plan; and

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[www.clackamas.us](http://www.clackamas.us)

- 3) An open discussion period during which citizens may testify on the two plans or the County's housing and community development needs.

**Recommendations:**

We recommend that the Board of County Commissioners take the following actions:

- 1) Hold a Public Hearing to review past performance of the County's Community Development program and to review the Proposed 2017-2021 Housing and Community Development Consolidated Plan and the proposed 2017 Action Plan;
- 2) Direct the Community Development Division staff to make any changes necessary as a result of the Board's consideration of testimony to the Proposed Plans, and prepare for Board approval of the Final 2017-2021 Housing and Community Development Consolidated Plan, 2017 Action Plan and other materials necessary for applying for FY 2017 CDBG, HOME, and ESG funds; and
- 3) Place approval of the Final 2017-2021 Housing and Community Development Consolidated Plan and 2017 Action Plan on the Board of County Commissioners' consent agenda for adoption at the April 27, 2017 meeting.

Thank you.

Richard Swift, Director  
Health, Housing & Human Services

**Attachments:**

- Proposed 2017-2021 Consolidated Plan
- Proposed 2017 Action Plan
- Three Year Funding Recommendations
- Notice of Public Hearing

## **PUBLIC HEARING**

The Clackamas County Board of County Commissioners will hold a

PUBLIC HEARING

at:

Public Services Building  
Hearings Room - 4<sup>th</sup> Floor, Room 409  
2051 Kaen Road  
Oregon City, Oregon

on Thursday, April 6, 2017 at 10:00 A.M.

This hearing will satisfy a U.S. Department of Housing and Urban Development requirement that the public annually be given an opportunity to review the past performance of the County's Housing and Community Development programs. The hearing is also to review the Proposed 2017-2021 Housing and Community Development Consolidated Plan and the Proposed 2017 Housing and Community Development Action Plan.

The Proposed 2017-2021 Consolidated Plan will become the basis for the County's annual applications under the three grant programs. The Proposed Action Plan consists of projects selected for funding in 2017.

Submission of grant application materials will enable the County to receive approximately \$1,900,000 in Community Development Block Grant (CDBG) funds, \$715,000 in Home Investment Partnership (HOME) funds, and \$170,000 in Emergency Solutions Grant (ESG) funds during the 2017 program year.

The hearing will consist of three parts:

- 1) A review of the past performance of the County's Housing and Community Development programs;
- 2) A review of the Proposed 2017-2021 Housing and Community Development Consolidated Plan and the Proposed 2017 Housing and Community Development Action Plan; and
- 3) An open discussion period during which citizens may testify on the two plans or the County's housing and community development needs.

The Consolidated Plan is available for review at the Clackamas County Community Development web site at: <http://www.clackamas.us/communitydevelopment/maps.html>. For additional information contact Mark Sirois at the Clackamas County Community Development Division (503-655-8591), Public Services Building, 2051 Kaen Road - Suite 245, Oregon City, Oregon, 97045.



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**DRAFT Funding Recommendations**  
**for the**  
**2017-2019 Community Development Block Grant Program**  
**and the**  
**2017-2019 HOME and Emergency Shelter Grant Programs**

2017  
Grant Funds      2018  
Grant Funds      2019  
Grant Funds

---

**Community Development Block Grant**  
**City Projects**

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**Canby**

- |    |   |           |
|----|---|-----------|
| 1. | N Pine Pedestrian, Storm and Street Improvements  | \$220,000 |
|    | Construct sidewalks on both sides of the street, drainage and street improvements on N Pine between NE 10th Ave. and NE 8th Ave |           |

**Colton**

- |    |   |           |
|----|---|-----------|
| 2. | Colton Water District - Virgil Rd. Waterline Replacement  | \$135,000 |
|    | Replace approximately 1,200 feet of old 4" waterline with 6" C900 PVC and add a fire hydrant at the north end of Virgil Rd. |           |

**Estacada**

- |    |   |           |
|----|---|-----------|
| 3. | Shafford Street Reconstruction Phase 1 (SE 4th - NE 2nd)  | \$150,000 |
|    | Reconstruction of roadway surface, new curbs and sidewalks, ADA ramps and stormwater conveyance system in Estacada. |           |
| 4. | Heat Pump Replacement/Roof Resurfacing  | \$100,000 |
|    | Funding to replace 6 aged Heat Pumps on the Estacada Community Center   |           |

**Gladstone**

- |    |   |           |
|----|---|-----------|
| 5. | E. Clarendon St. 2017   | \$255,000 |
|    | Improvements to E. Clarendon St between Portland & Union Avenues, including waterline, sewer, storm drains, new curbs, sidewalks, & new street surface. |           |

**Sandy**

- |    |  |          |
|----|--|----------|
| 6. | Southeast Sandy ADA Improvements   | \$75,000 |
|    | Funding to re-construct a minimum of 30 (thirty) existing ADA wheelchair ramps on public streets in th ecity of Sandy. |          |

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## **Unincorporated/Countywide Projects**

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### **Clackamas**

- |            |           |  |  |
|------------|-----------|--|--|
| 7. WeBUILT | \$140,000 |  |  |
|------------|-----------|--|--|
- Funding to design and build a road and sidewalk from SE 90th to the road end west on Tolbert St, and place a new fire hydrant at 8909 SE Tolbert. This location will develop permanent multi-family housing for people with disabilities.

### **Countywide**

- |                                    |           |           |           |
|------------------------------------|-----------|-----------|-----------|
| 8. Housing Rehabilitation Programs | \$400,000 | \$400,000 | \$400,000 |
|------------------------------------|-----------|-----------|-----------|
- Housing Rehabilitation Programs provide needed home-repair assistance to low income households throughout Clackamas County.
- |   |          |          |           |
|---|----------|----------|-----------|
| 9. Mobile/Manufactured Home Roofing Project | \$40,000 | \$70,000 | \$100,000 |
|---|----------|----------|-----------|
- Roof Replacement for owner occupied mobile/manufactured homes located in parks throughout Clackamas County.
- |                                   |          |          |          |
|-----------------------------------|----------|----------|----------|
| 10. Optional Emergency Assistance | \$25,000 | \$25,000 | \$25,000 |
|-----------------------------------|----------|----------|----------|
- Emergency assistance to individuals or agencies for emergency assistance due to a fire, landslide, snowstorm, flood or other such emergency. Funding and assistance with relocation of residents and/or associated expenses to mitigate the effects of the emergency conditions.

### **Jennings Lodge**

- |                           |          |           |          |
|---------------------------|----------|-----------|----------|
| 11. Head Start Classrooms | \$75,000 | \$100,000 | \$75,000 |
|---------------------------|----------|-----------|----------|
- Funding to increase capacity to serve from 40 to 60 additional Head Start children and their families by completing the River Road complex. Completion of this project will add 1 classroom and free up another to serve at risk young children. (Tier 2 funding project)

### **Molalla**

- |                                  |  |  |           |
|----------------------------------|--|--|-----------|
| 12. Arbor Terrace Rehabilitation |  |  | \$200,000 |
|----------------------------------|--|--|-----------|
- Arbor Terrace farmworker housing needs substantial rehabilitation. The Housing Authority of Clackamas County owns Arbor Terrace Apartments, a farmworker affordable housing development in Mollala, Oregon.

### **Oregon City**

- |                                      |           |  |  |
|--------------------------------------|-----------|--|--|
| 13. Pleasant Avenue Veterans Housing | \$255,000 |  |  |
|--------------------------------------|-----------|--|--|
- Funding to design and build a 22-units of housing on Pleasant Avenue in Oregon City. This affordable housing project will provide formerly homeless veterans and veteran families a safe, stable and affordable place to live.

**TBD**

<p><b>14. Tiny Houses Community</b>            Funding for land acquisition, site planning, site preparation and other associated costs of creating a Tiny Houses Community for up to 10 homeless adults in Clackamas County, including eligible costs for a community facility and 10 tiny homes.</p>	\$100,000	\$100,000	\$35,000
<p><b>15. Cottage Housing Cluster for Affordable Homeownership</b>            Funding to purchase one or more vacant parcels of land to be developed with clusters of affordable, modestly-sized cottage land trust houses for low income homebuyers.</p>			\$227,000

**Public Service Projects**

**Countywide**

<p><b>16. Clackamas County Employment Investment Program</b>            Clackamas County Employment Investment Program assists 67 low-income Clackamas County residents per year with significant barriers to employment (201 total) to increase self-sufficiency, with additional outreach contacts to public housing residents.</p>	\$50,000	\$45,000	\$40,000
<p><b>17. Housing Rights and Resources</b>            Housing Rights &amp; Resources is a partnership between Clackamas County Social Services, Legal Aid &amp; Fair Housing Council. It actively addresses &amp; promotes fair housing &amp; furthers housing opportunity for all, focusing on homeless &amp; low-income residents.</p>	\$140,000	\$140,000	\$140,000
<p><b>18. Jackson Transitional Housing</b>            Jackson Transitional Housing provides 6 housing units with supportive services for primarily homeless adults or childless couples, works with participants to increase income and address and overcome barriers to permanent housing placement. (Tier 2 funding project)</p>	\$63,000	\$67,000	\$67,000

**Milwaukie**

<p><b>19. Sports Mentorship for Low-Income Youth</b>            Maintain/create new mentored relationships between low-income housing youth and an athletic Coach/Mentor providing meaningful sports/recreational opportunities to engage in physical activity, healthy lifestyle choices and life skill building.</p>	\$30,000	\$25,000	\$20,000
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## Planning and Admin

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### Countywide

20. 2019 and 2021 Homeless Count Planning Planning, implementation, data collection, reporting and evaluation for 2019 homeless count, a HUD mandated activity. Planning for 2021 homeless count. Special efforts made to reach underserved populations, veterans, unaccompanied youth & rural homeless.	\$10,000	\$20,000	\$10,000
21. CDBG Grant Administration and Planning CDBG grant administration, planning, monitoring and reporting.	\$385,889	\$356,095	\$347,290
Community Development Block Grant Sub-Total	<b>\$1,998,889</b>	<b>\$1,898,095</b>	<b>\$1,786,290</b>

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## HOME Investment Partnership Act Unincorporated/Countywide Projects

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### Countywide

22. Tenant Based Rental Assistance The TBRA Program will assist individual households who are homeless or at risk of becoming homeless. Maximum assistance is 24 months and may be used for rent, utility costs, security deposits, and/or utility deposits.	\$75,000	\$75,000	\$75,000
23. CHAP Homebuyer Assistance Program This project will assist low-income first-time homebuyers in purchasing single-family homes by providing funds for down payment and closing costs.	\$50,000	\$50,000	\$50,000
24. HOME Grant Administration HOME Grant administration, contract monitoring and reporting.	\$71,252	\$67,689	\$64,305

## Planning and Admin

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25. HOME Multifamily Housing Project HOME Multifamily Housing Project to be determined.	\$490,265	\$458,201	\$427,741
--	-----------	-----------	-----------

### Countywide

26. HOME CHDO Operating funds HOME funds for CHDO Operating Funds	\$26,000	\$26,000	\$26,000
HOME Investment Partnership Act Sub-Total	<b>\$712,517</b>	<b>\$676,890</b>	<b>\$643,046</b>

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## Emergency Solutions Grant Unincorporated/Countywide Projects

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### Suppressed

27. Los Ninos Casa Hogar Shelter Los Ninos Cuentan, Casa Hogar provides emergency shelter for 30-60 days to homeless families in the Clackamas	\$10,000	\$10,000	\$10,000
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### **Public Service Projects**

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28. NHA Annie Ross House Emergency Shelter Operations ESG funding to support NHA Annie Ross House Emergency Shelter operations that serves families with children who are currently experiencing homelessness.			\$31,000
29. NHA HomeBase Rapid Rehousing program ESG funding to support NHA's HomeBase program to provide homelessness prevention and rapid re-housing to those most in need.	\$56,678	\$52,678	\$20,678

### Clackamas

30. Springwater ESG Shelter Funding for an emergency youth shelter. Springwater provides temporary housing and support services to young people (ages 16 to 22) experiencing homelessness in Clackamas County in a staffed, co-ed home setting.	\$11,000	\$11,000	\$11,000
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### Suppressed

31. CWS Emergency Shelter for Domestic Violence Victims Funding to continue the operation of emergency shelter services for homeless households fleeing domestic and/or sexual violence. These core services include emergency shelter, case management, housing referrals, mental health counseling,	\$40,000	\$40,000	\$40,000
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## **Planning and Admin**

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### Administration

32. Emergency Solutions Grant Administration Emergency Solutions Grant (ESG) grant administration, contract monitoring and reporting	\$12,822	\$12,181	\$11,572
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	2017 Grant Funds	2018 Grant Funds	2019 Grant Funds
<b>Countywide</b>			
33. Emergency Solutions Grant HMIS Funding for ESG Homeless Management Information System (HMIS) to maintain data quality, user training and reporting requirements to HUD.	\$40,459	\$36,552	\$30,041
Emergency Solutions Grant Sub-Total	<b>\$170,959</b>	<b>\$162,411</b>	<b>\$154,291</b>
<b>Continuum of Care Public Service Projects</b>			
<b>Countywide</b>			
34. CoC Planning 2017 CoC funding to coordinate and coordinate the homeless count efforts across the county and submit annual funding applications for over \$2 million of HUD Continuum of Care (CoC) funding for county agencies and non-profit providers of services and housing to homeless persons in Clackamas County.	\$61,095	\$61,095	\$61,095
35. CoC HMIS CoC funding to operate the Homeless Management Information System (HMIS), train users, collect data, validate data and report data to HUD.	\$70,862	\$70,862	\$70,862
Continuum of Care Sub-Total	<b>\$131,957</b>	<b>\$131,957</b>	<b>\$131,957</b>
<b>Grand Total</b>	<b>\$3,014,322</b>	<b>\$2,869,353</b>	<b>\$2,715,584</b>

**2017 GRANT YEAR NOTES:**

**Tier 2 Projects: HeadStart Classroom Project will be reduced if funding drops below anticipated funding levels. Public Services Tier 2 Projects: Jackson Place funding will be reduced if funding drops below anticipated funding levels. HOME - Any funds received as HOME Program Income will be allocated to administration and to Mutli-family housing projects.**

# CLACKAMAS COUNTY

## HOUSING AND COMMUNITY DEVELOPMENT

### 2017 ACTION PLAN



Clackamas County  
Housing and Community Development Division  
Public Services Building  
2051 Kaen Road – Suite 245  
Oregon City, Oregon  
(503) 655-8591  
[www.clackamas.us/communitydevelopment/](http://www.clackamas.us/communitydevelopment/)

**MARCH 2017 DRAFT – 2.0**

Annual Action Plan  
2017

1

# CLACKAMAS COUNTY BOARD OF COMMISSIONERS

Chair: Jim Bernard

Commissioner: Sonya Fischer

Commissioner: Ken Humberston

Commissioner: Paul Savas

Commissioner: Martha Schrader

County Administrator  
Don Krupp

## POLICY ADVISORY BOARD

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## DEPARTMENT OF HEALTH, HOUSING AND HUMAN SERVICES

Director of Health, Housing and Human Services  
Richard Swift

Housing and Community Development  
Chuck Robbins, Director



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## **AP-15 Expected Resources – 91.220(c)(1,2)**

### **Introduction**

Clackamas County Housing and Community Development Division works closely with the Housing Authority of Clackamas County, the County Behavioral Health Program, the Continuum of Care, non-profit agencies and the local County Social Service agencies to secure and administer many sources of funding for services, programs and rent assistance to benefit low-income residents of Clackamas County.

These expected resources are estimates based on historical funding trends, amounts to be matched and leveraged.

### **HOME Project-Related Soft Costs**

When HOME funds are allocated to an affordable housing project (as opposed to TBRA or CHDO operating), Clackamas County will have the option of charging reasonable and necessary staff and overhead support to the project as project-related soft costs. These may include:

- Processing of applications for HOME funds
- Appraisals required by HOME regulations
- Preparation of work write-ups, specifications, and cost estimates or review of these items if an owner has had them independently prepared
- Project underwriting
- Construction inspections and oversight
- Project documentation preparation
- Costs associated with a project-specific environmental review
- Relocation and associated costs
- Costs to provide information services such as affirmative marketing and fair housing information to prospective tenants
- Staff and overhead costs related any of the above actions

**Anticipated Resources**

Program	Source of Funds	Uses of Funds	Expected Amount Available Year 1				Expected Amount Available Reminder of ConPlan \$	Narrative Description
			Annual Allocation: \$	Program Income: \$	Prior Year Resources: \$	Total: \$		
CDBG	public - federal	Acquisition Admin and Planning Economic Development Housing Public Improvements Public Services	1,817,859	100,000	0	1,917,859	6,406,826	The FY 2017 program year is the beginning of the 5-year Consolidated Plan. The expected amount available is based on the assumption that funds will be cut by 5% each year.
HOME	public - federal	Acquisition Homebuyer assistance Homeowner rehab Multifamily rental new construction Multifamily rental rehab New construction for ownership TBRA	712,517	200,000	0	912,517	2,511,178	The FY 2017 program year is the beginning of the 5-year Consolidated Plan. The expected amount available is based on the assumption that funds will be cut by 5% each year

Program	Source of Funds	Uses of Funds	Expected Amount Available Year 1				Expected Amount Available Reminder of ConPlan \$	Narrative Description
			Annual Allocation: \$	Program Income: \$	Prior Year Resources: \$	Total: \$		
ESG	public - federal	Conversion and rehab for transitional housing Financial Assistance Overnight shelter Rapid re-housing (rental assistance) Rental Assistance Services Transitional housing	170,959	0	0	170,959	602,526	The FY 2017 program year is the beginning of the 5-year Consolidated Plan. The expected amount available is based on the assumption that funds will be cut by 5% each year

Table 1 - Expected Resources – Priority Table

**Explain how federal funds will leverage those additional resources (private, state and local funds), including a description of how matching requirements will be satisfied**

Resources reasonably expected to be made available to supplement CDBG funds include local matching to be contributed by project sponsors. Matching contributions (cash or in-kind) equivalent in value to a minimum of 20% of the project cost are required by County policies. It is anticipated that funding available to finance community development activities from local matching sources and will total at least \$xxx,xxx. CDBG anticipates approximately \$100,000 of program income per year from the Housing Rehabilitation program loan repayments and \$25,000 of prior year funds will support annual projects.

The Continuum of Care application process will renew at least \$1,700,000 of funding annually for homeless services, programs and rent assistance for homeless individuals and families. In 2016 CoC was eligible to apply for an additional \$251,421 of funds as a bonus project. In 2016 HUD awarded the Clackamas Continuum a total of \$2,087,390 which includes additional funding due to increased Fair Market Rent (FMR) rates and additional funds for the Housing Our Heros homeless veterans and families housing assistance program.

**HOME Program Income**

HOME Program Income (PI) is generated from the repayment of HOME loans that the county has made to affordable housing projects. As provided for in the 2016 HOME Interim Rule, Clackamas County will retain HOME PI that is received during the program year, and allocate it to a specific project or projects in the subsequent program year. For the program year ending June 30, 2017, the county anticipates that it will retain approximately \$42,000 of HOME PI, and will allocate the PI to a HOME multi-family housing project in the upcoming program year.

ESG funds will be matched using private donations, local and state homeless prevention funds.

**If appropriate, describe publically owned land or property located within the jurisdiction that may be used to address the needs identified in the plan**

No publically owned land is available for this purpose.

**Discussion**

The Housing and Community Development Division will continue to partner with the Housing Authority of Clackamas County, the County Behavioral Health Program, the County Health Centers, the Continuum of Care, non-profit agencies, for profit housing developers and the local County Social Service agencies to explore new programs, services and financial resources for programs and services that benefit our

low-income and special needs residents.

Anticipated Resources amounts are based on anticipated funding levels, anticipated program income, prior year funds carried forward and expected matching funds on individual community projects.

### **HOME Program Income**

HOME Program Income (PI) is generated from the repayment of HOME loans that the county has made to affordable housing projects. As provided for in the 2016 HOME Interim Rule, Clackamas County will retain HOME PI that is received during the program year, and allocate it to a specific project or projects in the subsequent program year. For the program year ending June 30, 2017, the county anticipates that it will retain approximately \$42,000 of HOME PI, and will allocate the PI to a HOME multi-family housing project in the upcoming program year.

## Annual Goals and Objectives

### AP-20 Annual Goals and Objectives

#### Goals Summary Information

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
1	Affordable Housing	2017	2021	Affordable Housing	Countywide	Affordable Housing	HOME: \$2,000,000	Rental units constructed: 300 Household Housing Unit Rental units rehabilitated: 100 Household Housing Unit Direct Financial Assistance to Homebuyers: 25 Households Assisted Tenant-based rental assistance / Rapid Rehousing: 100 Households Assisted
2	Housing Rehabilitation	2017	2021	Affordable Housing	Countywide	Affordable Housing	CDBG: \$1,000,000	Rental units rehabilitated: 50 Household Housing Unit Homeowner Housing Rehabilitated: 100 Household Housing Unit
3	Public Services	2017	2021	Non-Homeless Special Needs	Countywide	Non-housing Community Development	CDBG: \$1,000,000	Public service activities other than Low/Moderate Income Housing Benefit: 10000 Persons Assisted

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
4	Homeless Assistance	2017	2021	Homeless	Countywide	Homelessness	ESG: \$600,000	Homeless Person Overnight Shelter: 1750 Persons Assisted
5	Public Facilities Improvements	2017	2021	Non-Housing Community Development	Countywide	Non-housing Community Development	CDBG: \$1,000,000	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit: 7500 Persons Assisted
6	Community Infrastructure Improvements	2017	2021	Non-Housing Community Development	Countywide	Non-housing Community Development	CDBG: \$1,500,000	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit: 10000 Persons Assisted

Table 2 – Goals Summary

### Goal Descriptions

1	<b>Goal Name</b>	Affordable Housing
	<b>Goal Description</b>	Affordable Housing projects will be completed in partnership with non-profit and private housing developers.
2	<b>Goal Name</b>	Housing Rehabilitation
	<b>Goal Description</b>	Housing Rehabilitation for home owners and renters will be provided by the Housing Rehabilitation program and in partnership with non-profit housing developers.
3	<b>Goal Name</b>	Public Services
	<b>Goal Description</b>	Public Services will be provided in partnership with agencies and non-profit organizations.



<b>4</b>	<b>Goal Name</b>	Homeless Assistance
	<b>Goal Description</b>	Homeless assistance is provided through Emergency Solutions Grants and Continuum of Care funding and services. The estimated goals are based on the assumption that annual funding will remain at current year levels.
<b>5</b>	<b>Goal Name</b>	Public Facilities Improvements
	<b>Goal Description</b>	Public Facilities will be built or improved in partnership with non-profit agencies and cities.
<b>6</b>	<b>Goal Name</b>	Community Infrastructure Improvements
	<b>Goal Description</b>	Community Infrastructure needs will be resolved in partnership with communities.

## Projects

### AP-35 Projects – 91.220(d)

#### Introduction

These projects were awarded in February 2017 after a competitive application process conducted in November and December of 2016.

#### Projects

#	Project Name
1	Virgil Rd. Waterline Replacement
2	Shafford Street Reconstruction Phase 1 (SE 4th - NE 2nd)
3	WeBUILT Street Improvement
4	2017 Housing Rehabilitation Program
5	Mobile/Manufactured Home Roofing Project
6	Head Start Classroom 2017
7	Pleasant Avenue Veterans Housing
8	Tiny Houses Community 2017
9	Employment Investment Program 2017
10	Housing Rights and Resources 2017
11	Jackson Transitional Housing 2017
12	Mentor Athletics 2017
13	Homeless County Planning 2017
14	CDBG Grant Administration 2017
15	Tenant Based Rental Assistance 2017
16	CHAP Homebuyer Assistance 2017
17	HOME Grant Administration 2017
18	CHDO Operating funds 2017
19	Optional Emergency Assistance 2017
20	HOME Multifamily Housing Project
21	HESG Administration HMIS and Shelters

**Table 3 - Project Information**

#### **Describe the reasons for allocation priorities and any obstacles to addressing underserved needs**

The allocation priorities are based on consultation with community members, cities and non-profit

agencies providing services throughout the county.

## AP-38 Project Summary

### Project Summary Information

<b>1</b>	<b>Project Name</b>	Virgil Rd. Waterline Replacement
	<b>Target Area</b>	Countywide
	<b>Goals Supported</b>	Community Infrastructure Improvements
	<b>Needs Addressed</b>	Non-housing Community Development
	<b>Funding</b>	CDBG: \$135,000
	<b>Description</b>	Colton Water District Replace approximately 1,200 feet of old 4" waterline with 6" C900 PVC and add a fire hydrant at the north end of Virgil Rd.
	<b>Target Date</b>	7/15/2019
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	There are nine households served by the District on Virgil Rd. Replacing the Virgil Rd. waterline is a high priority because it will correct lost water issues and that will benefit all 500 metered households within Colton Water District.
	<b>Location Description</b>	Colton, Oregon. A rural community between Molalla and Estacada.
	<b>Planned Activities</b>	The project will replace approximately 1,200 feet of aging 4" PVC waterline with 6" C900 PVC from Schieffer Rd. to the north end of S. Virgil Rd. and to add a fire hydrant at the north end of S. Virgil Rd.
<b>2</b>	<b>Project Name</b>	Shafford Street Reconstruction Phase 1 (SE 4th - NE 2nd)
	<b>Target Area</b>	Countywide
	<b>Goals Supported</b>	Public Facilities Improvements
	<b>Needs Addressed</b>	Non-housing Community Development
	<b>Funding</b>	CDBG: \$150,000

	<b>Description</b>	Reconstruction of roadway surface, new curbs and sidewalks, ADA ramps and stormwater conveyance system on Shafford Street in Estacada.
	<b>Target Date</b>	6/10/2019
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	300 Households will benefit from this street and sidewalk improvement project.
	<b>Location Description</b>	This street reconstruction project is located in a low and moderate income residential area as is noted on the Clackamas County 2010 Census Block Area Map.
	<b>Planned Activities</b>	<p>The residents living along Shafford Street reside in single family homes. Shafford Street was constructed as an incomplete street and is not paved to the curb. This work will include full reconstruction of the roadway section, and CDBG funds will be combined with city SDC funds to cover excavation, paving, new curbs and 5-foot wide sidewalks, existing driveway tie-ins, ADA ramps, sanitary sewer replacements and storm system.</p> <p>The length of the project is 900 lineal feet and includes one half of the length of Shafford Street which is categorized as a minor collector. The total project area is 32,400 SF.</p>
<b>3</b>	<b>Project Name</b>	WeBUILT Street Improvement
	<b>Target Area</b>	Countywide
	<b>Goals Supported</b>	Community Infrastructure Improvements
	<b>Needs Addressed</b>	Affordable Housing
	<b>Funding</b>	CDBG: \$140,000
	<b>Description</b>	Funding to design and build a road and sidewalk from SE 90th to the road end west on Tolbert St, and place a new fire hydrant at 8909 SE Tolbert. This location will develop permanent multi-family housing for people with disabilities.
	<b>Target Date</b>	6/11/2019

	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	This street improvement project will enable a special needs housing project to move forward. 43 households will benefit after the housing has been constructed.
	<b>Location Description</b>	8909 SE Tolbert, Happy Valley, Oregon.
	<b>Planned Activities</b>	Street Improvements - To construct a road and sidewalk and update water and sewer lines and add a fire hydrant for lots 3600, 3700, 3800, 3900, 3902 on the west end of Tolbert St. A half road improvement of 250 feet in length. The road in this neighborhood has not been completed. It is uneven and dangerous to drive on and limits service access. The neighborhood is populated by apartments, and single family homes with many low income and minority renters.
4	<b>Project Name</b>	2017 Housing Rehabilitation Program
	<b>Target Area</b>	Countywide
	<b>Goals Supported</b>	Housing Rehabilitation
	<b>Needs Addressed</b>	Affordable Housing
	<b>Funding</b>	CDBG: \$400,000
	<b>Description</b>	Housing Rehabilitation Programs provide needed home-repair assistance to low income households throughout Clackamas County.
	<b>Target Date</b>	6/25/2019
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	35 low income households will benefit from these services
	<b>Location Description</b>	County wide services.
	<b>Planned Activities</b>	Housing Rehabilitation Program staff provide needed home-repair assistance grants and loans to low income households throughout Clackamas County.
5	<b>Project Name</b>	Mobile/Manufactured Home Roofing Project
	<b>Target Area</b>	Countywide
	<b>Goals Supported</b>	Affordable Housing
	<b>Needs Addressed</b>	Affordable Housing

	<b>Funding</b>	CDBG: \$40,000
	<b>Description</b>	Roof Replacement for owner occupied mobile/manufactured homes located in parks throughout Clackamas County.
	<b>Target Date</b>	7/27/2018
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	10 low income households
	<b>Location Description</b>	Countywide
	<b>Planned Activities</b>	Working in conjunction with the Weatherization program funding, Roof Replacement for owner occupied mobile/manufactured homes located in parks throughout Clackamas County.
6	<b>Project Name</b>	Head Start Classroom 2017
	<b>Target Area</b>	Countywide
	<b>Goals Supported</b>	Public Facilities Improvements
	<b>Needs Addressed</b>	Non-housing Community Development
	<b>Funding</b>	CDBG: \$75,000
	<b>Description</b>	Multi-year funding to increase capacity to serve from 40 to 60 additional Head Start children and their families by completing the River Road complex. Completion of this project will add 1 classroom and free up another to serve at risk young children.
	<b>Target Date</b>	7/30/2020
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	40 children from low-income households
	<b>Location Description</b>	<p align="LEFT">16518 SE River Road, Milwaukie, OR 97267</p>
<b>Planned Activities</b>	Build a new classroom building to increase capacity to serve from 40 to 60 additional Head Start children and their families by completing the River Road complex. Completion of this project will add 1 classroom and free up another to serve at risk young children.	
	<b>Project Name</b>	Pleasant Avenue Veterans Housing

7	<b>Target Area</b>	Countywide
	<b>Goals Supported</b>	Affordable Housing
	<b>Needs Addressed</b>	Affordable Housing Homelessness
	<b>Funding</b>	CDBG: \$255,000
	<b>Description</b>	Funding to design and build a 22-units of housing on Pleasant Avenue in Oregon City. This affordable housing project will provide formerly homeless veterans and veteran families a safe, stable and affordable place to live.
	<b>Target Date</b>	6/30/2020
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	22 units of housing will benefit approximately 30 low-income persons.
	<b>Location Description</b>	Pleasant Avenue in Oregon City, Oregon.
	<b>Planned Activities</b>	Design and build a 22-units of housing on Pleasant Avenue in Oregon City. This affordable housing project will provide formerly homeless veterans and veteran families a safe, stable and affordable place to live.
8	<b>Project Name</b>	Tiny Houses Community 2017
	<b>Target Area</b>	Countywide
	<b>Goals Supported</b>	Homeless Assistance
	<b>Needs Addressed</b>	Homelessness
	<b>Funding</b>	CDBG: \$100,000
	<b>Description</b>	Multi-year funding for land acquisition, site planning, site preparation and other associated costs of creating a Tiny Houses Community for up to 10 homeless adults in Clackamas County, including eligible costs for a community facility and 10 tiny homes.
	<b>Target Date</b>	7/30/2020
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	10 homeless adults

	<b>Location Description</b>	To be determined
	<b>Planned Activities</b>	Funding for land acquisition, site planning, site preparation and other associated costs of creating a Tiny Houses Community for up to 10 homeless adults in Clackamas County, including eligible costs for a community facility and 10 tiny homes.
9	<b>Project Name</b>	Employment Investment Program 2017
	<b>Target Area</b>	Countywide
	<b>Goals Supported</b>	Public Services
	<b>Needs Addressed</b>	Non-housing Community Development
	<b>Funding</b>	CDBG: \$50,000
	<b>Description</b>	Public Services multi-year funding to assist 67 low-income Clackamas County residents per year with significant barriers to employment (201 total) to increase self-sufficiency, with additional outreach contacts to public housing residents.
	<b>Target Date</b>	6/28/2019
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	67 low-income persons
	<b>Location Description</b>	County-wide services.
	<b>Planned Activities</b>	Public Services multi-year funding to assist 67 low-income Clackamas County residents per year with significant barriers to employment (201 total) to increase self-sufficiency, with additional outreach contacts to public housing residents.
10	<b>Project Name</b>	Housing Rights and Resources 2017
	<b>Target Area</b>	Countywide
	<b>Goals Supported</b>	Affordable Housing Public Services Homeless Assistance
	<b>Needs Addressed</b>	Affordable Housing Homelessness
	<b>Funding</b>	CDBG: \$140,000



	<b>Description</b>	Public Services multi-year funding for the Housing Rights & Resources partnership between Clackamas County Social Services, Legal Aid & Fair Housing Council to address & promote fair housing & further housing opportunity for all, focusing on homeless & low-income residents.
	<b>Target Date</b>	6/28/2019
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	2000 persons per year.
	<b>Location Description</b>	county-wide services
	<b>Planned Activities</b>	Public Services multi-year funding for the Housing Rights & Resources partnership between Clackamas County Social Services, Legal Aid & Fair Housing Council to address & promote fair housing & further housing opportunity for all, focusing on homeless & low-income residents.
<b>11</b>	<b>Project Name</b>	Jackson Transitional Housing 2017
	<b>Target Area</b>	Countywide
	<b>Goals Supported</b>	Public Services
	<b>Needs Addressed</b>	Homelessness
	<b>Funding</b>	CDBG: \$63,000
	<b>Description</b>	Public services multi-year funding to staff the Jackson Transitional Housing that provides 6 housing units with supportive services for primarily homeless adults or childless couples, works with participants to increase income and address and overcome barriers to permanent housing placement.
	<b>Target Date</b>	6/24/2020
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	6 to 8 homeless persons
	<b>Location Description</b>	Oregon City, Oregon

	<b>Planned Activities</b>	Public services multi-year funding to staff the Jackson Transitional Housing that provides 6 housing units with supportive services for primarily homeless adults or childless couples, works with participants to increase income and address and overcome barriers to permanent housing placement.
<b>12</b>	<b>Project Name</b>	Mentor Athletics 2017
	<b>Target Area</b>	Countywide
	<b>Goals Supported</b>	Public Services
	<b>Needs Addressed</b>	Non-housing Community Development
	<b>Funding</b>	CDBG: \$30,000
	<b>Description</b>	Public Services multi-year funding to staff the Mentor Athletics program to maintain/create new mentored relationships between low-income housing youth and an athletic Coach/Mentor providing meaningful sports/recreational opportunities to engage in physical activity, healthy lifestyle choices and life skill building.
	<b>Target Date</b>	6/28/2019
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	15 low income children in public housing.
	<b>Location Description</b>	Public housing units in Oregon City or Milwaukie, Oregon.
	<b>Planned Activities</b>	Public Services multi-year funding to staff the Mentor Athletics program to maintain/create new mentored relationships between low-income housing youth and an athletic Coach/Mentor providing meaningful sports/recreational opportunities to engage in physical activity, healthy lifestyle choices and life skill building.
<b>13</b>	<b>Project Name</b>	Homeless County Planning 2017
	<b>Target Area</b>	Countywide
	<b>Goals Supported</b>	Homeless Assistance
	<b>Needs Addressed</b>	Homelessness
	<b>Funding</b>	CDBG: \$10,000

	<b>Description</b>	Planning, implementation, data collection, reporting and evaluation for 2019 homeless count, a HUD mandated activity. Planning for 2021 homeless count. Special efforts made to reach underserved populations, veterans, unaccompanied youth & rural homeless.
	<b>Target Date</b>	7/14/2020
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	Not applicable
	<b>Location Description</b>	County-wide.
	<b>Planned Activities</b>	Planning, implementation, data collection, reporting and evaluation for 2019 homeless count, a HUD mandated activity. Planning for 2021 homeless count. Special efforts made to reach underserved populations, veterans, unaccompanied youth & rural homeless.
<b>14</b>	<b>Project Name</b>	CDBG Grant Administration 2017
	<b>Target Area</b>	Countywide
	<b>Goals Supported</b>	Affordable Housing Housing Rehabilitation Public Services Homeless Assistance Public Facilities Improvements Community Infrastructure Improvements
	<b>Needs Addressed</b>	Affordable Housing Homelessness Non-housing Community Development
	<b>Funding</b>	CDBG: \$385,889
	<b>Description</b>	CDBG grant administration, planning, monitoring and reporting.
	<b>Target Date</b>	6/5/2019
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	Not applicable
	<b>Location Description</b>	County-wide
	<b>Planned Activities</b>	CDBG grant administration, planning, monitoring and reporting.

15	<b>Project Name</b>	Tenant Based Rental Assistance 2017
	<b>Target Area</b>	Countywide
	<b>Goals Supported</b>	Homeless Assistance
	<b>Needs Addressed</b>	Homelessness
	<b>Funding</b>	HOME: \$75,000
	<b>Description</b>	The TBRA Program will assist individual households who are homeless or at risk of becoming homeless. Maximum assistance is 24 months and may be used for rent, utility costs, security deposits, and/or utility deposits.
	<b>Target Date</b>	6/28/2019
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	10 households per year will benefit from this rental assistance
	<b>Location Description</b>	County wide
	<b>Planned Activities</b>	The TBRA Program will assist individual households who are homeless or at risk of becoming homeless. Maximum assistance is 24 months and may be used for rent, utility costs, security deposits, and/or utility deposits.
16	<b>Project Name</b>	CHAP Homebuyer Assistance 2017
	<b>Target Area</b>	Countywide
	<b>Goals Supported</b>	Affordable Housing
	<b>Needs Addressed</b>	Affordable Housing
	<b>Funding</b>	HOME: \$50,000
	<b>Description</b>	This project will assist low-income first-time homebuyers in purchasing single-family homes by providing funds for down payment and closing costs.
	<b>Target Date</b>	6/27/2019
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	5 to 7 households will benefit from CHAP

	<b>Location Description</b>	to be determined
	<b>Planned Activities</b>	Clackamas Homebuyer Assistance Program. (CHAP)
17	<b>Project Name</b>	HOME Grant Administration 2017
	<b>Target Area</b>	Countywide
	<b>Goals Supported</b>	Affordable Housing Housing Rehabilitation
	<b>Needs Addressed</b>	Affordable Housing
	<b>Funding</b>	HOME: \$71,252
	<b>Description</b>	HOME Grant administration, contract monitoring and reporting.
	<b>Target Date</b>	6/27/2019
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	Not applicable
	<b>Location Description</b>	Not applicable
	<b>Planned Activities</b>	HOME Grant administration, contract monitoring and reporting.
18	<b>Project Name</b>	CHDO Operating funds 2017
	<b>Target Area</b>	Countywide
	<b>Goals Supported</b>	Affordable Housing
	<b>Needs Addressed</b>	Affordable Housing
	<b>Funding</b>	HOME: \$26,000
	<b>Description</b>	CHDO operating funds
	<b>Target Date</b>	6/11/2020
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	Not applicable
	<b>Location Description</b>	Countywide locations to be determined
	<b>Planned Activities</b>	CHDO operating funds
	<b>Project Name</b>	Optional Emergency Assistance 2017

<b>19</b>	<b>Target Area</b>	Countywide
	<b>Goals Supported</b>	Homeless Assistance Community Infrastructure Improvements
	<b>Needs Addressed</b>	Homelessness Non-housing Community Development
	<b>Funding</b>	CDBG: \$25,000
	<b>Description</b>	Optional Emergency Assistance Optional funding and assistance with relocation of residents and/or associated expenses to mitigate the effects of the emergency conditions due to a fire, landslide, snowstorm, flood or other such emergency.
	<b>Target Date</b>	6/27/2019
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	To be determined
	<b>Location Description</b>	To be determined
	<b>Planned Activities</b>	Optional Emergency Assistance Optional funding and assistance with relocation of residents and/or associated expenses to mitigate the effects of the emergency conditions due to a fire, landslide, snowstorm, flood or other such emergency.
<b>20</b>	<b>Project Name</b>	HOME Multifamily Housing Project
	<b>Target Area</b>	Countywide
	<b>Goals Supported</b>	Affordable Housing
	<b>Needs Addressed</b>	Affordable Housing
	<b>Funding</b>	HOME: \$490,265
	<b>Description</b>	HOME Multifamily Housing Project to be determined.
	<b>Target Date</b>	6/26/2020
	<b>Estimate the number and type of families that will benefit from the proposed activities</b>	60 units for low income families with some members having a disability

	<b>Location Description</b>	HOME Multifamily Housing Project to be determined.
	<b>Planned Activities</b>	<p>HOME Multifamily Housing Project to be determined.</p> <p><b>HOME Project-Related Soft Costs</b></p> <p>When HOME funds are allocated to an affordable housing project (as opposed to TBRA or CHDO operating), Clackamas County will have the option of charging reasonable and necessary staff and overhead support to the project as project-related soft costs. These may include:</p> <ul style="list-style-type: none"> <li>• Processing of applications for HOME funds</li> <li>• Appraisals required by HOME regulations</li> <li>• Preparation of work write-ups, specifications, and cost estimates or review of these items if an owner has had them independently prepared</li> <li>• Project underwriting</li> <li>• Construction inspections and oversight</li> <li>• Project documentation preparation</li> <li>• Costs associated with a project-specific environmental review</li> <li>• Relocation and associated costs</li> <li>• Costs to provide information services such as affirmative marketing and fair housing information to prospective tenants</li> <li>• Staff and overhead costs related any of the above actions</li> </ul> <p><b>HOME Program Income</b></p> <p>HOME Program Income (PI) is generated from the repayment of HOME loans that the county has made to affordable housing projects. As provided for in the 2016 HOME Interim Rule, Clackamas County will retain HOME PI that is received during the program year, and allocate it to a specific project or projects in the subsequent program year. For the program year ending June 30, 2017, the county anticipates that it will retain approximately \$42,000 of HOME PI, and will allocate the PI to a HOME multi-family housing project in the upcoming program year.</p>
21	<b>Project Name</b>	HESG Administration HMIS and Shelters
	<b>Target Area</b>	Countywide
	<b>Goals Supported</b>	Homeless Assistance
	<b>Needs Addressed</b>	Homelessness
	<b>Funding</b>	ESG: \$170,959
	<b>Description</b>	Emergency Solutions Grant Administration, monitoring and reporting. Rapid re-housing, HMIS funding and Shelters

<b>Target Date</b>	6/25/2020
<b>Estimate the number and type of families that will benefit from the proposed activities</b>	Not applicable
<b>Location Description</b>	Countywide
<b>Planned Activities</b>	Emergency Solutions Grant Administration, monitoring and reporting: \$12, 822 Rapid re-housing: \$56,678 HMIS funding: \$40,459 Emergency Shelters: \$62,000



## AP-50 Geographic Distribution – 91.220(f)

### Description of the geographic areas of the entitlement (including areas of low-income and minority concentration) where assistance will be directed

Assistance is directed throughout the county. No geographic areas in Clackamas County were targeted.

The 2015 median annual income for the Portland-Metro MSA, which includes Clackamas County, is \$73,900 for a household of 4 people. Low income (50% of AMI) persons and households have an income of less than \$36,750 per year or \$3,062 per month for a family of 4. For a single person the median income per year is \$51,730. A low income adult person would have an income of less than \$25,750 per year or less than \$2,146 per month.

Nine and a half percent (9.5%) of Clackamas County residents are living below the official poverty level in Clackamas County based on the 2005-2009 American Community Survey results. Female householders with children had the highest rates of poverty, and nearly half of female householders with children under the age of five were found to be living below poverty.

The United States Department of Housing and Urban Development (HUD) has generated a series of standards that can be used to determine if a Census Tract Block Group has a minority concentration or a concentration of low-income households. To determine if a low-income concentration exists, the Area Median Income (AMI) of a block group must be below 50% of the Area Median Income for the Metropolitan Statistical Area (MSA).

### Geographic Distribution

Target Area	Percentage of Funds
County-wide	90%

Table 4 - Geographic Distribution

### Rationale for the priorities for allocating investments geographically

No geographic areas in Clackamas County were targeted except to the extent that projects serving an area must be located in a qualified census tract or area with at least 43.44% low- and moderate-income residents. Clackamas County has a 43.44% low-and moderate income exception.

### Discussion

Clackamas County Housing and Community Development Division reviewed both race and ethnic

information from the 2010 Census Bureau to determine minority ranking. The 22 block groups with the highest minority ranking represent 10 percent of all the block groups in Clackamas County. A total of 37,379 persons were living in these high concentrations of minority areas.

### **Concentrations of Both high Low to Moderate Income and high Minority**

The Minority and Low/Mod map attached shows the areas of both minority populations and LMI household concentrations.

22 block groups are approximately 10% of the total number of block groups in Clackamas County. These nine (9) block groups rank in the top 22 for both minority and LMI, and represent the block groups with the highest concentrations of poverty and minorities.

Five (5) of the high concentration (HC) block groups are located in the North Clackamas Area. One (1) of the HC block groups is in Milwaukie and two (2) of the HC block groups is in Canby. A total of 13, 855 people live in these areas of concentrated minority and poverty.

## Affordable Housing

### AP-55 Affordable Housing – 91.220(g)

#### Introduction

Clackamas County Housing and Community Development has 2 goals and 2 grants that support affordable housing. The Housing Rehabilitation Goal will be funded with CDBG funds to assist 30 households per year. HOME funds will assist 120 households per year through building new units, preserving existing units, providing Tenant Base Rental Assistance and homebuyer financial assistance.

<b>One Year Goals for the Number of Households to be Supported</b>	
Homeless	20
Non-Homeless	120
Special-Needs	10
Total	150

**Table 5 - One Year Goals for Affordable Housing by Support Requirement**

<b>One Year Goals for the Number of Households Supported Through</b>	
Rental Assistance	20
The Production of New Units	60
Rehab of Existing Units	50
Acquisition of Existing Units	20
Total	150

**Table 6 - One Year Goals for Affordable Housing by Support Type**

#### Discussion

## **AP-60 Public Housing – 91.220(h)**

### **Introduction**

The Housing Authority of Clackamas County (HACC) is a part of the county's Health, Housing and Human Services (H3S) Department.

### **Actions planned during the next year to address the needs to public housing**

- *Provide service coordination through the ROSS grant for 540 public housing units*
- *Coordinate with local Workforce organizations to connect residents with employment and training opportunities*
- *Coordinate with CTEC Youth Services to provide unengaged teens with mentoring, employment and education opportunities.*
- *Coordinate with Mentor Athletics to provide youth sports, recreation and mentoring opportunities for HACC youth*
- *Provide service coordination and support to residents facing eviction.*
- *Coordinate with Public Health to provide for health, mental health and service coordination for most vulnerable residents.*
- *Manage community gardens in the Oregon City and Milwaukie neighborhoods, encourage resident participation and leadership. Provide opportunities for continuing garden and nutrition education.*
- *Manage the Hillside Community Food Basket in coordination with the Oregon Food Bank*
- *Maintain and manage community computers available for resident use*
- *Promote resident engagement and leadership through the HACC Resident Advisory Board*
- *Promote available community resources and opportunities available to residents through a quarterly newsletter.*

### **Actions to encourage public housing residents to become more involved in management and participate in homeownership**

**Public housing residents are encouraged to participate in PHA (HACC) management through participation in the activities of the Resident Advisory Board (RAB).**

**Public housing residents are encouraged to participate in home ownership.** HACC residents are provided information about the Clackamas Homebuyer Assistance Program (CHAP) and the IDA

Program.

**HACC offers a range of economic empowerment strategies to assist public housing residents to become economically self-sufficient.** Under the HUD Resident Opportunity for Self-Sufficiency Grant (ROSS), HACC has a full-time Service Coordinator available to coordinate supportive services and other activities designed to help PHA residents attain economic and housing self-sufficiency.

**Effective Partnership with Regional Workforce Agencies Connecting Residents to Employment and Training Opportunities:** HACC collaborates with regional work force agencies including the Clackamas Workforce Partnership, Community Solutions of Clackamas County and WorkSource to connect residents with employment and training opportunities. Through these collaborative partnerships residents get basic soft skills instruction, participate in workshops and get support in job search activities, have opportunities to participate in paid on the job training, access training in targeted high growth industries such as construction, manufacturing, health care and technology.

**Asset Building through Individual Development Accounts:** Through the IDA program, HACC residents are provided with the opportunity to save for post-secondary education, to grow a business or to purchase a home using an IDA matched savings account. IDA matched savings accounts match every \$1 a participant saves with \$3. IDA savers must complete a 10 hour financial education workshop where they learn about budgeting, credit repair and credit building, debt management and avoiding predatory lending. IDA savers are also required to complete 6 hours of asset specific training related to their goal. Through the IDA program, residents are also linked to other financial empowerment resources such as free tax preparation sites, referrals to non-profit credit counseling agencies, home ownership counseling and opportunities to access low-interest emergency loans. HACC residents are also provided information about the Clackamas Homebuyer Assistance Program, a HOME funded down-payment assistance program. By providing access to the IDA Program and the CHAP, Clackamas County encourages public housing residents to participate in homeownership.

HACC encourages Public Housing residents to engage in management through a Resident Advisory Board (RAB). RAB membership is comprised of public housing and Section 8 Housing Choice Voucher (HCV) leaders that represent residents served by HACC. The RAB convenes not fewer than two times per year to develop, approve, review and evaluate HACC's Annual Plan. The RAB is also consulted for input and approval of any significant amendment or modification to the Annual Plan. A member of the RAB has a permanent seat on the County's Housing Advisory Board.

**If the PHA is designated as troubled, describe the manner in which financial assistance will be**

## **provided or other assistance**

The Housing Authority of Clackamas County (HACC) is not designated as a troubled PHA.

## **Discussion**

Clackamas County has formed a Housing Advisory Board to provide affordable housing policy guidance to the Housing Authority and the Board of County Commissioners. The Housing Advisory Board (HAB) is an eight member body that convenes once each month to discuss topics and issues pertaining to the development, preservation and promotion of affordable housing of all types in Clackamas County. Currently, the HAB has been working on developing an Affordable Housing Toolkit that may help mitigate some of the impediments to affordable housing development. The toolkit will describe available policies and resources that the county may utilize to address the growing need for affordable housing in the County. Tools that promote both new development and preservation of affordable housing are being considered. At this writing, the toolkit is still in the development stage. When the toolkit is finalized, the Affordable Housing Toolkit will be presented to the BCC for consideration.

## **AP-65 Homeless and Other Special Needs Activities – 91.220(i)**

### **Introduction**

The H3S Housing and Community Development Division (HCD) coordinates most of the homeless and other special needs activities through its partnerships with non-profit service providers, the Social Services Division, Continuum of Care, the Housing Authority of Clackamas County public housing agency. Activities include: CoC coordination, CoC Homeless Point in Time count, ESG coordination, CoC Homeless Outreach and Discharge Planning.

**Housing Assistance for Alcohol and Drug Recovery:** The Behavioral Health Division (BHD) of Clackamas County has developed supportive housing for those in alcohol and drug recovery. BHD, through CODA, has implemented housing assistance and services program for Clackamas County residents in alcohol and drug recovery. The program has three main components: substance abuse recovery, finding any retaining permanent housing, and increasing income by connecting people with benefits and/or employment options. Direct client dollars can be used for, but not limited to, moving costs, rent assistance, application fees, deposits, and paying off previous debts. The target population for this program is individuals participating in alcohol and drug recovery at or below 50% Median Family Income, homeless, or at risk of homelessness.

### **Describe the jurisdictions one-year goals and actions for reducing and ending homelessness including**

#### **Reaching out to homeless persons (especially unsheltered persons) and assessing their individual needs**

**Households with dependent children:** Locally funded HomeBase (RRH and homelessness prevention) expanded last year, reaching 459 people & plans to increase capacity next year. The locally funded Bridges to Housing Program stabilizes housing for high need homeless families serving 38 families & 63 children last year. Through the Rent Well-RRH project 25 families from the streets/emergency shelter will be assisted. Clackamas Womens Services and a network of churches and faith-based organizations in North Clackamas are working to address family homelessness in their community.

**Survivors/Victims of domestic violence:** The CoC includes a TH and a PSH project focused on domestic violence survivors and their families. This provider operates an ESG funded DV emergency shelter which recently doubled its beds, a homelessness prevention program, Beyond Shelter, and the newly opened Family Justice Center. The projects involve a wide range of on-site services from over 12 public safety and services agencies, funded by more than 24 public and private entities. Victims in Clackamas County can now access an advocate, plan for their safety, talk to a police officer, meet with a prosecutor, receive medical assistance, file a protective order in a video court, receive information on shelter and

get help with transportation—all in one location on a drop-in basis.

**Unaccompanied youth:** Springwater is a CoC TH for youth 16- 21 funded with CoC, ESG, local government & private funds. HomeSafe is a CoC TH for pregnant and parenting youth 6 – 21 funded with CoC, local and state grants. Host Homes is funded with local, state and private grants. The program is for 16- 18 year olds attending school houses up to six unaccompanied youth with families. The Outside In program funded with local government grants links with school Homeless Liaisons to provide health services to unaccompanied youth 16-17 in the school & community.

**Persons who routinely sleep on the streets or in other places not meant for human habitation:**

Clackamas County has a range of services for persons sleeping on the streets or in other places not meant for human habitation. Two major service centers (Clackamas Services Center and Father’s Heart) provide hot meals, clothing, medical services, and severe weather shelter, and are close to where many unsheltered homeless reside. Several smaller agencies also provide basic needs and outreach to homeless on the streets and places not meant for habitation.

Compassion events, similar to Project Homeless Connect, are held throughout the year to provide a “one stop” for basic services, such as food, clothing, medical care, veterans’ services and housing options. A new severe weather winter shelter opened in 2013 in a rural area with a significant homeless camping population.

**Homelessness among veterans:** Housing Authority of Clackamas County has housed 25 homeless veterans using VASH vouchers. The Veterans Services Office conducts veteran outreach with free medical screenings, warm clothing, information on compensation and other veterans’ benefits, employment, housing, counseling and other services. Clackamas County is part of a new SSVF grant and is providing office space and supplemental rental assistance using state funds for a nonprofit provider of outreach, homeless placement and homeless prevention for veterans. This grant has streamlined access to the regional Grant Per Diem program for vets who are working on permanent housing placement either through VASH, SSVF or other programs.

**Addressing the emergency shelter and transitional housing needs of homeless persons**

The activities to address emergency shelter needs within the County will be funded through the Emergency Solutions Grants (ESG) program. 1000 Households will receive HESG program services from July 1, 2016 to June 30, 2017. The FY 2016 ESG allocation will be supplemented by matching funds at least equal to its amount.

Primary emphasis will continue to be on payment of emergency shelter operations expenses including utilities, maintenance, insurance, and staff salary costs. The purpose of emphasizing payment of operations expenses is to provide some predictability and stability to the operation of the shelters by



assuring that their most basic expenses are met. This assures the continued operation of the facilities in times of scarce and fluctuating resources, and it compliments specific fundraising efforts for special projects.

Northwest Housing Alternatives' Annie Ross House and Clackamas Women's Services' Evergreen House, provide emergency shelter to homeless families with children and survivors of domestic violence, respectively. Independent living services are provided through The Inn's Springwater program, which targets assistance to the homeless youth population. Los Ninos Cuenten's Casa Hogar provides emergency shelter services to Hispanic/Latino homeless families and individuals who have survived domestic violence. Case management at each program improves vocational and coping skills to make the transition from homelessness to independent living. Continuum of Care funds Also provide 49 beds of transitional housing for homeless households, including families, singles, and youth.

Clackamas County's Coordinated Housing Access system provides a one-stop option for homeless individuals and families to be assessed and matched with all homeless programs in the County for which they are eligible.

**Helping homeless persons (especially chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth) make the transition to permanent housing and independent living, including shortening the period of time that individuals and families experience homelessness, facilitating access for homeless individuals and families to affordable housing units, and preventing individuals and families who were recently homeless from becoming homeless again**

Chronically homeless individuals and families: In 2014, The Continuum of Care increased the number of beds for chronically homeless persons in Clackamas County. The CoC did this by leveraging Housing Authority Housing Choice Vouchers, converting Permanent Supportive Housing (PSH) beds to chronically homeless beds, reaching out to PSH providers to prioritize beds for chronically homeless persons and using Medicaid to provide enhanced services for chronically homeless persons in PSH beds.

Families with children: The CoC increased capacity and worked on outreach goals to end homelessness among households with dependent children. The HomeBase program utilized multiple funding sources to expand and become the largest RRH and homelessness prevention program in the County. Through the reallocated Rent Well RRH project, the CoC will be able to stabilize housing for 15 families from the streets/emergency shelter. The locally-funded Bridges to Housing (B2H) Program stabilizes housing for high-need homeless families and assisted 136 persons last year. Outreach plan includes referrals from different geographic parts of the county. An outreach strategy adopted by the HPC educates landlords

on housing choice vouchers.

B2H serves high-needs homeless families with children, with a capacity of 30 families at a time. These homeless families have multiple complex needs which often include but are not limited to housing barriers, domestic violence, addictions, mental health issues and disabling conditions. B2H families receive longer term housing subsidies and intensive services designed to support their income self-sufficiency and permanent housing stability as well as the children's and adult's educational success.

Veterans and their families: Housing Authority of Clackamas County has housed 45 homeless veterans using VASH vouchers. The Veterans Services Office coordinates with Social Services to conduct veteran outreach with free medical screenings, warm clothing, information on compensation and other veterans' benefits, employment, housing, counseling and other services. Clackamas County is part of an SSVF grant and provides office space for a nonprofit provider of outreach, homeless placement and homeless prevention for veteran families. This grant has streamlined access to the regional Grant Per Diem program for vets who are working on permanent housing placement either through VASH, SSVF or other programs.

Unaccompanied youth: Springwater Transitional Housing for youth 18-23 is funded with CoC, ESG, local government, and private funds. Case management, vocational education services, physical and mental health support, supervision and shelter are provided to youth.

HomeSafe Transitional Housing for pregnant and parenting youth 16 – 21 is funded with CoC, local and state grants. Youth have access to rent assistance in scattered apts., case management, referral and linkages to mainstream services.

Independent Living Plans (ILPs) are funded with state and local govt. funds for independent living services to youth transitioning from foster care. Case management is provided for youth discharged from Child Welfare at 18 or 19 years old without permanent housing. Case managers refer and link ex-foster youth to programs and services.

**Helping low-income individuals and families avoid becoming homeless, especially extremely low-income individuals and families and those who are: being discharged from publicly funded institutions and systems of care (such as health care facilities, mental health facilities, foster care and other youth facilities, and corrections programs and institutions); or, receiving assistance from public or private agencies that address housing, health, social services, employment, education, or youth needs.**

These discharge plans have been confirmed through the Continuum of Care application and planning

process.

Foster Care: The Oregon Department of Human Services (DHS), dictates the Foster Care Discharge Policy in which the County actively participates. DHS refers willing children to a Continuum of Care provider for a Life Skills/Transition Readiness Assessment. This results in: 1. Identification of resources and linkages needed to assist the child in transitioning to independent living, including life skills training, housing subsidies, college tuition, and health insurance and 2. Preparation of an individualized Comprehensive Transition Plan which must be approved by a Family Court Judge every 6 months until the child is successfully transitioned to independent living.

Youth can access Chafee rental subsidies to help them secure an apartment. They can secure tuition-free access to a state college along with Chafee grants to assist with room and board. Youth with developmental disabilities and/or mental illness exiting the foster care system continue to receive an array of services including options such as adult foster care and supported housing that are based on unique client needs. Each option is designed to ensure that youth exiting the foster care system are not routinely discharged into homelessness.

Health Care: The discharge planning for low-income and disabled people has historically resided with the State through the Medicaid program. With the advent of the Affordable Care Act (ACA) and the expansion of Oregon's Medicaid program, discharge planning is shifting to local control. All Medicaid providers are joined in Coordinated Care Organizations (CCOs) covering specific geographic areas. The CCOs integrate physical, mental and dental health services. The ACA Medicaid expansion has been structured to align the financial incentives with clinical outcomes/housing status of patients. This has begun to persuade hospital systems and health care providers to plan and act outside their silo, to begin discussions with CoCs about effective liaison and resource sharing.

Mental Health: The Discharge Policy in place for persons being discharged from a mental health facility is ensured by Clackamas County Behavioral Health Department (CCBH). As part of Health Share, the area's Medicaid Coordinated Care Organization, CCBH has both financial and clinical incentives to ensure that no county residents are discharged from a psychiatric hospital without housing and services. In addition, Oregon is under an U. S. Dept. of Justice 4 year plan to provide better community outcomes for people with mental illness. Specific mandates are subcontracted by the State to CCBH. The local Discharge Policy, which is monitored and enforced by the State, requires all adults leaving a psychiatric hospital be housed consistent with their level of care needs and personal wishes.

Corrections: The purposeful effort to structure successful community re-entry for inmates is a local mandate spearheaded by the Clackamas County Sheriff's Office (CCSO) which participates on the CoC governing board. Because community safety is its #1 priority, CCSO promotes post-discharge services with housing to reduce recidivism. Likewise, the Clackamas County Behavioral Health (CCBH) is a provider in the local Medicaid program, Health Share. CCBH understands that successful re-entry will

reduce incidence and cost of ER visits and hospitalization.

## **Discussion**

Our Jurisdiction receives no HOPWA funding. Our jurisdiction works with Cascade Aids Project (CAP) a service agency which provides housing and services for persons that are HIV positive in our three-county area that is referred to as the Portland Metro Area.

## **AP-75 Barriers to affordable housing – 91.220(j)**

### **Introduction:**

The majority of resident feedback during Assessment of Fair Housing community meetings was that most people liked where they lived, however, many people including persons with disabilities felt that it was very difficult to find another affordable unit should they want to move. Current state law provides a mechanism to ensure that a certain percentage of new development is reserved for low-income tenants (known as “inclusionary housing” or “inclusionary zoning”). Clackamas will be evaluating the feasibility and the various options for implementing inclusionary zoning within the county.

The Low Income Housing Tax Credit (LIHTC) market has come to a screeching halt due to potential tax policy changes at the federal level. Clackamas County relies on the State of Oregon LIHTC Program which recently provided this guidance to all proposed affordable housing projects: State of Oregon OHCS decision....letter dated 2/10/2017...

“anticipated federal corporate tax reform has negatively impacted the LIHTC equity market creating real-time consequences for the 33 multifamily affordable housing projects in the OHCS "pipeline". These projects have received funding reservations based on tax credit pricing that is no longer available. Among projects facing probable gaps are a large number of 4% LIHTC projects, as well as the 9% LIHTC projects that the Housing Stability Council approved in November 2016.”

“Do not issue a 2017 LIHTC and HOME NOFA and instead fund additional 2016 applications, reserving some credits for gaps in 9% LIHTC pipeline projects and use flexible gap funding resources to help fill funding gaps on as many pipeline projects as possible”

Zoning Issues: Multi-family housing developments are typically restricted to areas that are zoned as high or medium density residential in each community and throughout the jurisdiction. Communities have many requirements for multifamily housing including: amenities such as onsite parking, fire access, buildings that “match” the character of the neighborhood and traffic impact studies, etc. All these requirements of multifamily housing projects increase the initial cost and result in affordable housing that is expensive to build and maintain. The State of Oregon has a land use plan (Goal 10) that requires all communities to allocate land for multifamily developments however some communities are more compliant than others. State and regional housing advocates are beginning to challenge communities to meet the Goal 10 requirements to provide land for multi-family housing developments. In 2015 Housing Land Advocates joined the Coalition for Affordable and Safe Housing to repeal Oregon’s ban on inclusionary zoning, and allow Oregon communities access to this important tool for creating affordable housing in areas of opportunity. The ban was lifted in 2016 with the passage of HB1533 which became effective June 2, 2016.

### **Actions it planned to remove or ameliorate the negative effects of public policies that serve**

**as barriers to affordable housing such as land use controls, tax policies affecting land, zoning ordinances, building codes, fees and charges, growth limitations, and policies affecting the return on residential investment**

As mention in AP-60 Public Housing the Clackamas County has formed a Housing Advisory Board to provide affordable housing policy guidance to the Housing Authority and the Board of County Commissioners. The Housing Advisory Board (HAB) is an eight member body that convenes once each month to discuss topics and issues pertaining to the development, preservation and promotion of affordable housing of all types in Clackamas County. Currently, the HAB has been working on developing an Affordable Housing Toolkit that may help mitigate some of the impediments to affordable housing development. The toolkit will describe available policies and resources that the county may utilize to address the growing need for affordable housing in the County. Tools that promote both new development and preservation of affordable housing are being considered. At this writing, the toolkit is still in the development stage. When the toolkit is finalized, the Affordable Housing Toolkit will be presented to the BCC for consideration.

In Clackamas County, many of the existing patterns of sprawl, decentralization and homogenous housing developments resulted from commuter demand for housing. Homogeneity, whether exclusively single family or multifamily, can result in limited housing choice suitable to needs and incomes of County residents. Undefined or subjective design standards can also make it difficult to meet affordable housing needs within built-out communities.

Access to affordable and adequate housing for households with lowest incomes has been restricted over the years. Since 2000, median renter income in the U.S. has fallen relative to contract rents. Utility costs have been increasing, as has the price of commuting to work. Quality of housing, particularly at the lowest rent levels, is at risk if property owners do not have assets to maintain units. The result is that lowest income tenants, in addition to the burden of finding housing at all, may be forced to live in unsuitable or unsafe housing.

A range of suitable housing choices should ideally be available to fit the entire range of household incomes, providing choices for all residents, including those who work in the community.

Households with extremely low incomes, especially those needing support services, find very few options. The Clackamas County 2017-2021 Comprehensive Plan, recognizes the goal of providing a variety of housing types and densities to meet the needs of County residents.

**Discussion:**

No additional information.

## **AP-85 Other Actions – 91.220(k)**

### **Introduction:**

Clackamas County Housing and Community Development Division (HCD) proposed the following actions in program year 2017 that address obstacles to meeting underserved needs, foster and maintain affordable housing, develop institutional structure, encourage public housing residents to become more involved in management and encourage public housing residents to attain home ownership. HCD continues to request proposals from housing development organizations for the development and preservation of multi-family affordable rental housing projects that serve lower income households. Funding available to support these activities included: HOME funds, Housing Choice Vouchers and Public Housing Replacement Funds.

In FY2017 potential special needs housing projects include: WeBUILT, a project to improve a roadway to a special needs housing development, Pleasant Avenue Veterans Housing and the Tiny Houses Community project with a location yet to be determined.

### **Actions planned to address obstacles to meeting underserved needs**

Clackamas County HCD will address obstacles to meeting underserved needs in FY2017 through these activities:

1. Leverage available program funds by requiring sponsor contributions.
2. Seek additional funding from public and private sources to finance program activities.
3. Continue a program to assist renters and homeowners who need safety and accessibility adaptations in order to remain in their own homes.
4. Investigate the development and implementation of an inspection program to enforce habitability standards in multi-family housing projects.
5. Promote and assist the development of additional transitional housing which will be available to low- and very low-income individuals and families.
6. Promote and assist the development of affordable housing which will be available to very low, low-,

and moderate-income individuals and families.

7. Increase capacity to assist Homeless Families with Children.

8. Develop a set of program policies to create a 15 percent set-aside in all new affordable housing developments specifically to assist the targeted special need populations.

9. Promote the use of Section 8 Project Based Vouchers into the development of any new affordable housing project.

### **Actions planned to foster and maintain affordable housing**

HOME funds will be used primarily to develop affordable housing units for rental by low-income individuals and families. HOME funds will also be used to assist Community Housing Development Organizations (CHDOs) with grants for operating costs allowed by 24 CFR 92.208. HCD ensures that HOME-assisted rental housing remains affordable by monitoring projects during the period of affordability for compliance with the HOME regulations at 24 CFR Part 92.

Clackamas County ensures the long-term affordability of HOME-assisted homebuyer properties during the period of affordability by monitoring to verify that the home remains owner-occupied. Monitoring activities include both desk and on-site monitoring.

For FY2017 HOME funded multifamily housing projects have yet to be determined due to the federal funding uncertainties and the ripple effect on the Low Income Housing Tax Credit program administered by the State of Oregon.

### **Actions planned to reduce lead-based paint hazards**

Clackamas County contracts with a professional firm to provide lead hazard evaluation services at no cost to the owners and buyers participating in its housing rehabilitation and homebuyer programs. When such hazards are discovered, they are addressed in a manner consistent with procedures approved by HUD, the State Health Division and the Department of Environmental Quality. However, the County does not anticipate using HOME funds for its housing rehabilitation and homebuyer programs in the next year. The HOME-funded project will be new construction and will not involve lead-



paint hazards.

### **Actions planned to reduce the number of poverty-level families**

The Housing and Community Development Division (HCD) coordinates efforts with the Social Services Division (SSD) to reduce the number of households below the poverty line. SSDs activities include:

- Participation in and staffing of the Continuum of Care in Clackamas County as well as the Continuum of Care Steering Committee (Governing Board) and the Homeless Policy Council.
- Coordination and maintenance of liaison relationships with McKinney Vento funded homeless liaisons that support the educational success of homeless children. These include each of the School Districts in the county, all Clackamas Educational Service District offices, and the State of Oregon Department of Higher Education.
- Contracting with a community based organization for a Homeless Student Success Project that enhances the capacity of the homeless liaison at the highest poverty school district in Clackamas County.
- Participation as one of the four lead agencies on the regional steering committee for the Rent Well tenant education program.
- Participation in the operations of the Janssen Transitional Housing Project (JTHP). SSD currently provides case management for the families living at Janssen. This HUD funded project, sponsored by the Housing Authority of Clackamas County, has been in operation for more than 20 years. JTHP provides seven (7) transitional housing units, intensive and comprehensive case management, flexible assistance to support residents increasing their income and housing stability, and other supportive services for homeless families with children.
- Maintain the Housing Rights and Resources Program which responds to the general public regarding emergency housing, housing discrimination, landlord-tenant concerns, low-cost housing, rent assistance and a variety of other housing-related issues.
- Maintain a contractual relationship with Legal Aid Services of Oregon and the Fair Housing Council of Oregon to support the delivery of Fair Housing services to Clackamas County residents. This contractual relationship hastens service delivery for people experiencing potential discrimination and/or fair

housing violations.

### **Actions planned to develop institutional structure**

The Housing and Community Development Division coordinates efforts with the Social Services Division (SSD) to develop institutional structure to strengthen the services system in Clackamas County.

SSD and CD worked together with Continuum of Care partners to develop and implement a county wide Coordinated Housing Access system. This system provides centralized access, eligibility screening and prioritization, using HUD guidelines, to all HUD funded homeless services and housing programs within the County. Three non-HUD funded homeless housing programs also elected to join the new coordinated system.

SSDs activities include: - Operation of the State of Oregon Housing and Community Services Low Income Rental Housing Fund (LIRHF). LIRHF provides time-limited rental payment assistance to case-managed clients of SSD.

- Administration of State Homeless Assistance Program (SHAP) funds sub-granted to the Annie Ross House family shelter and Clackamas Women's Services domestic violence shelter.

- Initial screening and intake for families wanting to enter the Annie Ross House shelter and two interfaith hospitality shelter networks (SON and LOTSM).

- Administration of the federal Emergency Food and Shelter Program (EFSP) and contracts with local shelters to provide night of shelter to homeless persons.

- Local administration of the state Emergency Housing Account (EHA). These funds support case management to families accessing the two interfaith hospitality network shelters. EHA funds are also used to support shelter bed nights at Clackamas Womens Services shelter, Annie Ross House, and the Inn Home emergency shelters.

- Operation of a locally funded Bridges to Housing program that provides high needs homeless families a longer term housing subsidy and intensive, comprehensive case management that focus on permanent housing stability and increasing income.

- Operation of the Rent Well tenant education program, providing year-round, ongoing tenant education in Spanish and English as well as case management to help homeless families with barriers to housing

placement locate and access permanent housing units.

- Operation of the Jackson Transitional program for adults who are homeless.

- Operation of the HSP program for families who are homeless or at imminent risk of homelessness needing short term rental assistance and supportive services in order to stabilize.

- Severe Weather Warming Centers at three sites, providing a total of 99 low barrier shelter beds for homeless persons on cold winter nights. These sites provide important linkages for the community efforts to identify and re-house chronically homeless persons.

### **Actions planned to enhance coordination between public and private housing and social service agencies**

The Housing and Community Development Division coordinates activities between public housing and assisted housing agencies through funding and reporting outcomes to state and federal agencies. The HOME program provides vital funding to private assisted housing providers that also apply for state tax credit funding. HOME funding is one of few sources of funds for affordable housing units in our rural urban county. Housing Rights and Resources program is an H3S program in the Social Services Division that provided housing referral and information services on all available housing services. H3S, HCD and HACC will coordinate on the following action items:

1. Coordinate with the County's Community Health and Social Services Divisions to maximize utilization of resources available to meet the needs of the homeless and persons with mental illness who need housing services.

2. Maintain the CCSS partnership with the State of Oregon Department of Human Services to operate the Housing Stabilization Program in the county. Now in its seventh year, the program serves families with children for up to 12 months. CCSS provides families intensive case management services with a goal of locating and maintaining safe, stable and affordable housing.

3. Maintain the partnership with SSD, Clackamas Women's Services, and Northwest Housing Alternatives to administer and operate the Homeless Prevention and Rapid Re-Housing Program. The program includes 3 elements: Rent Subsidy Program designed to provide short term (3 months) and medium term (up to 6 months) of rent subsidies to low- and moderate-income renters. A Rapid Re-Housing Program designed to provide housing placement, short-term rental assistance, case management and

other support services to families with dependent children who have been living in emergency shelters or on the streets for at least seven days. Counseling and Housing Stabilization Services including case management, outreach, housing search and placement, legal services, and Credit Repair.

4. Maintain the CCSS partnership with HACC and Mental Health to operate the HUD funded Shelter-Plus-Care Program. Shelter Plus Care provides rent assistance to case managed clients of Social Services and Mental Health who are homeless.

5. Coordinate with SSD and Northwest Housing Alternative to ensure the continued success of the HomeBase Program homeless prevention and rapid rehousing services. This coordination will include sharing of information concerning case management best practices, and consistent and accurate data entry into the Homeless Management Information System.

#### **Discussion:**

Clackamas County Housing and Community Development Division (HCD) works in conjunction with the Housing Authority of Clackamas County, the Social Services Division, the Behavioral Health Division, Community Health Centers and community non-profit housing providers and private non-profit social services providers to address obstacles to meeting underserved needs, foster and maintain affordable housing, develop institutional structure, encourage public housing residents to become more involved in management and encourage public housing residents to attain home ownership.

In 2017 HCD is funding several affordable housing projects, an employment training program, a fair housing rights and information program, homeless prevention and rapid rehousing services, and a youth mentoring program for youth in public housing.

## Program Specific Requirements

### AP-90 Program Specific Requirements – 91.220(I)(1,2,4)

#### Introduction:

The Clackamas Homebuyer Assistance Program (CHAP), a down payment assistance program for first-time homebuyers will be available for low-income residents. More information about the CHAP can be found here: <http://www.clackamas.us/communitydevelopment/chap.html>

### Community Development Block Grant Program (CDBG)

#### Reference 24 CFR 91.220(I)(1)

Projects planned with all CDBG funds expected to be available during the year are identified in the Projects Table. The following identifies program income that is available for use that is included in projects to be carried out.

1. The total amount of program income that will have been received before the start of the next program year and that has not yet been reprogrammed	0
2. The amount of proceeds from section 108 loan guarantees that will be used during the year to address the priority needs and specific objectives identified in the grantee's strategic plan.	0
3. The amount of surplus funds from urban renewal settlements	0
4. The amount of any grant funds returned to the line of credit for which the planned use has not been included in a prior statement or plan	0
5. The amount of income from float-funded activities	0
<b>Total Program Income:</b>	<b>0</b>

#### Other CDBG Requirements

1. The amount of urgent need activities	1
2. The estimated percentage of CDBG funds that will be used for activities that benefit persons of low and moderate income. Overall Benefit - A consecutive period of one, two or three years may be used to determine that a minimum overall benefit of 70% of CDBG funds is used to benefit persons of low and moderate income. Specify the years covered that include this Annual Action Plan.	90.00%

### HOME Investment Partnership Program (HOME)

#### Reference 24 CFR 91.220(I)(2)

1. A description of other forms of investment being used beyond those identified in Section 92.205 is	
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2017	

as follows:

The County does not anticipate offering any other forms of investment of HOME funds beyond those described in 24 CFR 92.205(b) in the 2016 program year.

The County will ensure that matching contributions from non-federal sources are made to housing that qualifies as affordable housing under the HOME program in 2016-2017. Matching funds will be in amount not less than 25 percent of the funds required to be matched per 24 CFR 92.218. We anticipate that eligible match will come primarily from non-federal cash contributions such as the State Housing Trust Fund, the value of foregone local fees or taxes and the value of donated voluntary labor and professional services.

### **HOME Project-Related Soft Costs**

When HOME funds are allocated to an affordable housing project (as opposed to TBRA or CHDO operating), Clackamas County will have the option of charging reasonable and necessary staff and overhead support to the project as project-related soft costs. These may include:

- Processing of applications for HOME funds
- Appraisals required by HOME regulations
- Preparation of work write-ups, specifications, and cost estimates or review of these items if an owner has had them independently prepared
- Project underwriting
- Construction inspections and oversight
- Project documentation preparation
- Costs associated with a project-specific environmental review
- Relocation and associated costs
- Costs to provide information services such as affirmative marketing and fair housing information to prospective tenants
- Staff and overhead costs related any of the above actions

2. A description of the guidelines that will be used for resale or recapture of HOME funds when used for homebuyer activities as required in 92.254, is as follows:

The Clackamas Homebuyer Assistance Program (CHAP) provides funds to low-income first time homebuyers for down-payment and reasonable closing costs. In accordance with 24 CFR

92.254(a)(4), the period of affordability is five years.

Should the CHAP property be voluntarily or involuntarily sold or title transferred, or should the owner no longer use the property as the primary residence, the entire amount of HOME funds invested in the project shall become immediately due and payable to the County. However, if the sale of the property occurs during the five-year period of affordability, and there are no net proceeds from the sale of the property, or the net proceeds are insufficient to repay the entire HOME investment due, the amount of HOME funds recaptured will be based on the net proceeds available from the sale, if any. The net proceeds are defined as the remainder of the final sale price of the property minus any superior non-HOME loan repayment and closing costs. *24 CFR §92.254(a)(5)*

During the five-year period of affordability, the County may permit a subsequent low-income purchaser of a CHAP property to assume the existing CHAP loan and HOME recapture obligation entered into by the original buyer when, a) no additional HOME assistance is provided to the subsequent homebuyer, and, b) the subsequent low-income homebuyer meets all of the eligibility requirements of the CHAP. In cases in which the subsequent homebuyer needs (and qualifies for) HOME assistance in excess of the balance of the original CHAP loan, the HOME subsidy to the original homebuyer must be recaptured. A separate CHAP loan shall be provided to the new homebuyer, and a new HOME affordability period shall be established based on that assistance to the buyer. *24 CFR §92.254(a)(5)(ii)*

More information is available at <http://www.clackamas.us/communitydevelopment/chap.html>.

3. A description of the guidelines for resale or recapture that ensures the affordability of units acquired with HOME funds? See 24 CFR 92.254(a)(4) are as follows:

Clackamas County intends to use the HOME affordable homeownership limits for the area provided by HUD. The County further ensures the long-term affordability of HOME-assisted homebuyer properties by enforcing resale and recapture provisions and by monitoring to verify that the home remains owner-occupied during the period of affordability. More information is available at <http://www.clackamas.us/communitydevelopment/chap.html>.

4. Plans for using HOME funds to refinance existing debt secured by multifamily housing that is rehabilitated with HOME funds along with a description of the refinancing guidelines required that will be used under 24 CFR 92.206(b), are as follows:

The County does not anticipate using HOME funds to refinance existing debt secured by multifamily

housing that is rehabilitated with HOME funds in the 2017 program year.

**Emergency Solutions Grant (ESG)  
Reference 91.220(l)(4)**

1. Include written standards for providing ESG assistance (may include as attachment)

Clackamas County has had several meetings with ESG providers and members of the CoC to develop CoC and ESG policies and performance standards. ESG policies have been developed in consultation with both ESG and CoC providers starting in January 2014 and on an ongoing basis. HCD staff consulted with CoC Steering Committee members on February 9, 2017 to discuss using ESG funds for Rapid Rehousing in 2017.

HCD staff consulted with CoC Homeless Council members on February 22, 2017 to discuss using ESG funds for Rapid Rehousing in 2017. CoC members and CoC Steering Committee is considering adding an equity performance measure in 2017.

HCD staff have attended CoC meetings for the last few years to discuss using ESG funds for HMIS ESG and CoC data collection efforts. CoC members have been aware and informed on the ESG program changes and funding. CoC members continue to be involved in developing performance measurement standards and priorities for both CoC and ESG funding.

2. If the Continuum of Care has established centralized or coordinated assessment system that meets HUD requirements, describe that centralized or coordinated assessment system.

A CoC working group of providers met in 2013 to implement coordinated assessment process. The result was a tool designed and agreed on by all affected programs with the intention of obtaining the most relevant information to make an appropriate referral. The Coordinated Housing Access (CHA) was launched on January 1, 2015 using a telephone call-in system and the HMIS system. CoC agencies and providers are reviewing processes to improve and streamline the intake process. The planning process involved identifying resources in our region and how resources are accessed by homeless persons and families. The system will cover the entire geographic region using a “hub” system as much as possible, though large portions of the county are rural and sparsely populated. The system will be easily accessed, primarily through our Housing Rights and Resources line, a one-stop number for housing information. This number is made available through 2-1-1, the county’s website, flyers and referring agencies.



3. Identify the process for making sub-awards and describe how the ESG allocation available to private nonprofit organizations (including community and faith-based organizations).

Currently ESG funds are allocated to four (4) nonprofit providers and the County as the HMIS administrator. The process for making sub-awards was to advertise the availability of ESG funding in 2016 as part of the 2017-2019 funding cycle. Four applications to provide Emergency Shelter services were received and reviewed. All four nonprofits were funded for homeless emergency shelter services. One of the shelters (ARH) will not be funded for the FY2017 and 2018 years because the shelter is being re-build as part of a campus re-design project. A Rapid Rehousing and Homeless prevention program will also be funded in FY2017. The contracts will be renewed annually at level funding. ESG and CoC providers are engaged in homeless services planning and ESG allocations. In FY2017 we anticipate that the ESG funding level will be decreased by 5% each year, the HMIS project will be decreased or increased based on the anticipated funding levels.

4. If the jurisdiction is unable to meet the homeless participation requirement in 24 CFR 576.405(a), the jurisdiction must specify its plan for reaching out to and consulting with homeless or formerly homeless individuals in considering policies and funding decisions regarding facilities and services funded under ESG.

The CoC has a formerly homeless person on the CoC Steering Committee governing board.

5. Describe performance standards for evaluating ESG.

ESG providers are evaluated using the CoC national performance measurements standards. Agencies that provide only emergency shelter services are evaluated by examining one measures of success: What percentage of persons leaving shelter are going to permanent housing?

The ESG program has not yet set a minimum percentage for shelters to meet. After another year of collecting data the ESG program staff and the CoC Steering Committee will meet to review the results and set a minimum standard. Since each shelter is population the specific performance can vary greatly.

**Discussion:**

In 2017 the ESG program will continue funding Rapid Rehousing and or Homeless prevention activities that were funded for the first time in 2014.

ESG program staff are working closely with the Continuum of Care for homeless programs to coordinate efforts, implement a coordinated assessment process, establish CoC and ESG program policies and to establish performance measures.

For the 2017 Action Plan, HCD staff presented and discussed recommended funding for CDBG and ESG projects with CoC members on March 22, 2017. HCD staff discussed ESG and CoC funding allocations, performance standards, outcomes, policies and procedures as well as the annual consultation process which occurs in March of every year. CoC members were invited to submit testimony on the funding levels and projects in the 2017 Action Plan at the April 6th public hearing.

CLACKAMAS COUNTY  
HEALTH, HOUSING AND HUMAN SERVICES  
DEPARTMENT  
HOUSING AND COMMUNITY  
DEVELOPMENT DIVISION



**2017-2021 CONSOLIDATED PLAN**

MARCH 2017 DRAFT - 2.0

Clackamas County  
Housing and Community Development Division  
Public Services Building  
2051 Kaen Road – Suite 245  
Oregon City, Oregon  
(503) 655-8591

[www.clackamas.us/communitydevelopment/](http://www.clackamas.us/communitydevelopment/)

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# Executive Summary

## ES-05 Executive Summary - 24 CFR 91.200(c), 91.220(b)

### 1. Introduction

Clackamas County Housing and Community Development is a division within the larger Clackamas County Health, Housing and Human Services Department that includes the Behavioral Health, Public Health, Health Centers, Social Services, the (public) Housing Authority, Community Solutions (workforce programs) and Children Youth and Families divisions.

### 2. Summary of the objectives and outcomes identified in the Plan Needs Assessment Overview

Housing and Community Development Division staff have used community survey data, public meeting comments, public housing waitlist information, Portland metropolitan area housing information and several reports to select the following goals to accomplish over the next 5 years:

1. Community Infrastructure Improvements - 10,000 persons to benefit.
2. Public Facilities Improvements - 7,500 persons to benefit.
3. Public Services - 10,000 persons will benefit.
4. Housing Rehabilitation - 150 households will benefit.
5. Affordable Housing - 260 households will benefit.
6. Homeless Assistance - 1,750 homeless persons will be assisted with shelter and services.

### 3. Evaluation of past performance

Clackamas County Housing and Community Development has been a major partner and funder of many affordable housing projects and most of the senior centers throughout the county over the last 20 years. The impact of projects and services supported with grant funds is often limited by the federal grant regulations and the actual annual funding levels although communities and non-profit partners do bring private resources to leverage the federal funds. Clackamas County Housing and Community Development Division continues to expend federal funds efficiently and effectively. Slow moving projects are cancelled allowing funds to be reallocated to projects that are completed as scheduled.

Clackamas County coordinates with and provides staff support to the homeless Continuum of Care.

Clackamas County has recently completed an Assessment of Fair Housing and established the following goals for program years 2017 to 2021:

1. Develop new housing units with long-term affordability for a broad range of low-income households with an emphasis on dispersal of affordable housing.
2. Increase accessibility to affordable housing for persons with disabilities and single parent familial status households. (households with children under 18 yrs.).
3. Improve access to housing and services for all protected classes.
4. Enforce Fair Housing laws and Increase public understanding of Fair Housing laws.
5. Coordinate Fair Housing Advocacy and Enforcement Efforts among regional partners
6. Ensure that all housing in Clackamas County is healthy and habitable.

#### **4. Summary of citizen participation process and consultation process**

Clackamas County Housing and Community Development Division maintains a Citizen Participation list of persons interested in programs and services funded by federal grants. Public meeting notices are posted in community newspapers and notices of funding availability are distributed throughout the county through newspapers and email lists. The Continuum of Care homeless services providers and public housing residents are engaged in annual public meetings to discuss programs, projects and services. The general public is also invited and engaged through solicitation of feedback through community online surveys and public meetings.

#### **5. Summary of public comments**

The general public is facing rapidly increasing demands for market rate housing resulting in sharp increases in rent and a very low apartment vacancy rate. Low-income persons are unable to move due to a lack of affordable housing units available throughout the county and particularly in areas of high opportunity for employment, shopping and community services. Public meetings were held on October 26, 2016, November 15, 2016 and April 6, 2017.

#### **6. Summary of comments or views not accepted and the reasons for not accepting them**

All public comments were accepted.

#### **7. Summary**

ADD summary statement after the April 6th BCC meeting.

# The Process

## PR-05 Lead & Responsible Agencies 24 CFR 91.200(b)

### 1. Describe agency/entity responsible for preparing the Consolidated Plan and those responsible for administration of each grant program and funding source

The following are the agencies/entities responsible for preparing the Consolidated Plan and those responsible for administration of each grant program and funding source.

Agency Role	Name	Department/Agency
Lead Agency	CLACKAMAS COUNTY	
CDBG Administrator	CLACKAMAS COUNTY	Housing and Community Development Division
HOPWA Administrator		
HOME Administrator	CLACKAMAS COUNTY	Housing and Community Development Division
ESG Administrator	CLACKAMAS COUNTY	Housing and Community Development Division
HOPWA-C Administrator	CLACKAMAS COUNTY	Community Development Division

**Table 1 – Responsible Agencies**

### Narrative

Clackamas County Housing and Community Development is a division within the larger Clackamas County Health, Housing and Human Services Department that includes the Behavioral Health, Public Health, Health Centers, Social Services, the (public) Housing Authority, Community Solutions (workforce programs) and Children Youth and Families divisions. Clackamas County receives no HOPWA funds. Services for persons with AIDS are provided by the nearby City of Portland, Oregon.

### Consolidated Plan Public Contact Information

Office location: Housing and Community Development Division Public Services Building 2051 Kaen Road – Suite 245 Oregon City, Oregon (503) 655-8591

Housing and Community Development Website: <http://www.clackamas.us/communitydevelopment/>

Clackamas County Housing and Community Development website includes maps of low/mod income areas, funding policies, meeting notices, meeting schedules, Consolidated Plans, annual Action Plans, information on HOME repairs grants and loans, and other programs.

Staff Contacts:

Consolidated Plan

CLACKAMAS COUNTY

5



Chuck Robbins, Director: chuck@clackamas.us

Kevin Ko, Housing and Community Development Manager: kko@clackamas.us

Mark Sirois, Project Coordinator: marksir@clackamas.us , 503.650.5664

Steve Kelly, Project Coordinator: stevekel@clackamas.us

## **PR-10 Consultation - 91.100, 91.200(b), 91.215(I)**

### **1. Introduction**

Clackamas County is an urban and rural county within the Portland/Vancouver metropolitan statistical area. Clackamas County provides the bulk of the social services, assisted housing services and public housing to low-income residents in the county. Clackamas County provides federal funding to non-profit housing developers to build, purchase and maintain assisted housing throughout the county.

### **Provide a concise summary of the jurisdiction's activities to enhance coordination between public and assisted housing providers and private and governmental health, mental health and service agencies (91.215(I)).**

Clackamas County Housing and Community Development Division (HCD) coordinates activities between public housing and assisted housing agencies through funding and reporting outcomes to state and federal agencies. The local public housing authority is a part of Clackamas County's Health, Housing and Human Services Department. Nonprofit and for profit housing developers and housing providers are in regular contact with HCD staff about project ideas and potential state and federal grants that could be combined with CDBG and HOME funds for a successful housing project proposal. The HOME program provides vital funding to affordable housing providers that also apply for state tax credit funding as one of few sources of funds available to develop affordable housing units in the rural parts of Clackamas County.

The Clackamas County Health, Housing and Human Services (H3S) Department includes; a public housing authority, a community development division, a public health division, a social services division, a behavioral health division and a primary care division. H3S is often a convener of agencies to apply for funding, build facilities and provide services to vulnerable populations. In some cases the county provides the services, and in other cases non-profit agencies provide the housing or services. CDBG funds also provide support for the Housing Rights and Resources program, an H3S program in the Social Services Division. This program provides housing referral and information on all available housing services and resources to residents in need of affordable housing and related services.

HCD consults directly with the county primary care health facilities and health services to coordinate services and projects.

HCD consults directly with local governments (15 cities and towns in Clackamas County) regarding public facilities and infrastructure projects. Adjacent governments including City of Portland, Multnomah County and Washington County are contacted regularly regarding public meetings however due to scheduling conflicts staff from these governments rarely attend our public meetings.

Currently HCD has business and civic leaders engaged in the community and housing development needs assessment through their activities on non-profit boards, planning councils and

commissions. Some non-profit agencies are considered civic organizations. HCD will continue to reach out to community groups that include civic and business leaders in the community. HCD is currently nurturing business contacts on the Housing Advisory Board that guides the Housing Authority of Clackamas County and county-wide affordable housing policy.

**Describe coordination with the Continuum of Care and efforts to address the needs of homeless persons (particularly chronically homeless individuals and families, families with children, veterans, and unaccompanied youth) and persons at risk of homelessness**

H3S Housing and Community Development Division (HCD) personnel administer the Continuum of Care (CoC) annual renewal application process and the Homeless Management Information System (HMIS). The same HCD office uses CDBG, ESG and CoC funds to support homeless services and for the Homeless Point in Time (PIT) count of homeless persons. The PIT is conducted with over 150 volunteers coordinated by the Social Services Division.

H3S Housing and Community Development Division (HCD) personnel administer the Continuum of Care (CoC) annual renewal application process and the Homeless Management Information System (HMIS). The annual Continuum of Care renewal application funds over \$2,000,000 of services and rent assistance to homeless persons in the county. CoC efforts secure services and support for over 478 persons including 32 chronically homeless persons (based on the CoC 2016 Housing Inventory Chart.)

**Describe consultation with the Continuum(s) of Care that serves the jurisdiction's area in determining how to allocate ESG funds, develop performance standards and evaluate outcomes, and develop funding, policies and procedures for the administration of HMIS**

The HCD staff coordinate the Continuum of Care monthly meetings and the CoC governing board activities. The CoC policies and ESG program policies were developed with both CoC and ESG homeless services providers. The CoC reviewed and adopted the current CoC and ESG policies in February 2017.

HCD personnel also provide the HMIS training and support for CoC and ESG providers. The monthly CoC activities and quarterly performance reports are coordinated by the same Community Development Division staff that coordinates the ESG funding applications and awards process. The FY 2017-2019 ESG funding recommendations were presented to the CoC Steering Committee on February 2, 2017 and to the CoC Homeless Council (CoC) for discussion and review on February 22, 2017. CoC providers, the local

public housing agency and all the agencies in the Continuum of Care are engaged in addressing the needs of homeless persons.

The CoC consults with Community Solutions, a Workforce Investment Act partner and division of H3S, to conduct employment related training for homeless persons.

**2. Describe Agencies, groups, organizations and others who participated in the process and describe the jurisdictions consultations with housing, social service agencies and other entities**

**Table 2 – Agencies, groups, organizations who participated**

1	<b>Agency/Group/Organization</b>	Housing Authority of Clackamas County
	<b>Agency/Group/Organization Type</b>	PHA
	<b>What section of the Plan was addressed by Consultation?</b>	Housing Need Assessment Public Housing Needs Homelessness Strategy Homeless Needs - Families with children Homelessness Needs - Veterans Market Analysis
	<b>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</b>	The Housing Authority is staffed by Clackamas County employees. The Housing Authority Director is also the director of the Housing and Community Development Division. The anticipated outcomes are coordinate efforts to maintain and build affordable housing units for low income residents as well as coordinated social services and employment training.
2	<b>Agency/Group/Organization</b>	NORTHWEST HOUSING ALTERNATIVES
	<b>Agency/Group/Organization Type</b>	Housing Services - Housing Services-homeless
	<b>What section of the Plan was addressed by Consultation?</b>	Housing Need Assessment Homelessness Strategy Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans Homelessness Needs - Unaccompanied youth
	<b>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</b>	Northwest Housing Alternatives (NHA) is one of a few non-profit housing developers in Clackamas County. NHA staff are active on the Continuum of Care homeless council as a provider of homeless housing services and homeless prevention services with ESG funding, local government funding and private foundation funding.
3	<b>Agency/Group/Organization</b>	CLACKAMAS WOMEN'S SERVICES
	<b>Agency/Group/Organization Type</b>	Housing Services-Victims of Domestic Violence Services-homeless Services - Victims

	<b>What section of the Plan was addressed by Consultation?</b>	Housing Need Assessment Homeless Needs - Chronically homeless Homeless Needs - Families with children
	<b>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</b>	Clackamas Womens Services (CWS) is one of a few providers of services for survivors of domestic violence in the county. CWS staff are active in the Continuum of Care homeless council. CWS also provides emergency shelter services funded in part by ESG funding as well as transitional housing and permanent housing services funded in part by Continuum of Care funding and private foundation funding.
4	<b>Agency/Group/Organization</b>	INN HOME
	<b>Agency/Group/Organization Type</b>	Services-Children Services-homeless Publicly Funded Institution/System of Care
	<b>What section of the Plan was addressed by Consultation?</b>	Homelessness Strategy Homeless Needs - Chronically homeless Homeless Needs - Families with children Homelessness Needs - Veterans
	<b>How was the Agency/Group/Organization consulted and what are the anticipated outcomes of the consultation or areas for improved coordination?</b>	The inn is a youth services agency that is actively involved in the homeless Continuum of Care.

**Identify any Agency Types not consulted and provide rationale for not consulting**

**Other local/regional/state/federal planning efforts considered when preparing the Plan**

<b>Name of Plan</b>	<b>Lead Organization</b>	<b>How do the goals of your Strategic Plan overlap with the goals of each plan?</b>
Continuum of Care	Clackamas County	CoC and ESG goals to prevent and reduce homelessness are incorporated in the Strategic Plan goals
Assessment of Fair Housing	Clackamas County	Assessment of Fair Housing goals are part of the Strategic Plan goals

Name of Plan	Lead Organization	How do the goals of your Strategic Plan overlap with the goals of each plan?
Metro Equitable Housing Report 2016	Metro Council	Metro is a regional land use planning governmental organization that determines the urban growth boundary for the metro area. Metro also plans and operates the solid waste transfer stations, regional parks, and several entertainment venues
2017-2020 Older Americans Act Area Plan	Clackamas County Social Services Division	The Social Services Division is the county coordinator of services to elderly persons and the community action agency. Many services are provided through the county senior centers and county social services staff.
OHCS Clackamas County Housing Profile 2013	State of Oregon	The Oregon Housing and Community Services (OHCS) Department prepared county housing profiles for the entire state.

**Table 3 – Other local / regional / federal planning efforts**

**Describe cooperation and coordination with other public entities, including the State and any adjacent units of general local government, in the implementation of the Consolidated Plan (91.215(I))**

Clackamas County has received and reviewed the following plans in preparation of this consolidated plan:

- The City of Portland Consolidated Plan
- The Metro Equitable Housing Report January 2016
- Portland Consortium Consolidated Plan for 2016-2020 (City of Portland, City of Gresham and Multnomah County)

Clackamas County also participates in a Regional Fair Housing Group to coordinate fair housing efforts in the metro region. Members of the group include 4 counties and 4 large cities in the region.

**Narrative (optional):**

Clackamas County is part of the Portland/Vancouver Metropolitan Statistical area which is currently grappling with an affordable housing crisis.

## **PR-15 Citizen Participation**

### **1. Summary of citizen participation process/Efforts made to broaden citizen participation Summarize citizen participation process and how it impacted goal-setting**

The Housing and Community Development Division held 2 public meetings, conducted a survey, accepted 34 applications for funding and held a public hearing to collect citizen input on housing and community development goals.



## Citizen Participation Outreach

Sort Order	Mode of Outreach	Target of Outreach	Summary of response/attendance	Summary of comments received	Summary of comments not accepted and reasons	URL (if applicable)
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1	Public Meeting	Non-targeted/ broad community	October 26, 2017. 6 people attended from 4 non-profit agencies. 2 staff were also present.	<p>Brianna Williamson provided a description of the Housing Rights and Resources program that is funded by CDBG. Brianna stated that the program helps residents avoid being evicted. Last year the program process over 2500 called from people seeking help with housing problems. The program is unique in that program staff help people describe the specifics of their particular housing issues as well as properly screen persons before referring them to legal Aid Services of Oregon if needed. The Housing Rights and Resources program also helps landlords get accurate information regarding their rights as landlords in addressing any concerns about difficult tenants. Erika Silver added that this service is much needed in Clackamas County to prevent people from becoming homeless and to help the County maintain good relationships with landlords. Martha McLennan, executive director of NHA, thanked Clackamas County for supporting the Annie Ross House and the HomeBase housing stabilization and homeless prevention program. The NHA campus in Milwaukie, Oregon is preparing for re-building the Annie Ross Shelter and other buildings to increase the number of housing units at the site. NHA is working with SIN network to provide additional shelter services if needed while Annie Ross Housing is being re-constructed. NHA has secured a site on Pleasant Street and will be applying for funding to build up to 20 units of homeless veterans family housing. Shelly Mead with Bridges to Change (B2C) explained that they provide transitional housing for persons exiting correctional facilities. B2C housing has services for homeless persons, persons who need alcohol and drug additions counseling and housing for sex offenders. B2C will be looking for additional funding for permanent affordable housing for persons leaving transitional housing services. Emily and Amy with NEDCO explained that they were at the meeting to learn more about the Clackamas County funding and application process. NEDCO has</p>	All public comments were accepted	
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Sort Order	Mode of Outreach	Target of Outreach	Summary of response/attendance	Summary of comments received	Summary of comments not accepted and reasons	URL (if applicable)
				<p>provided foreclosure counseling, business incubation for food and beverage entrepreneurs, home ownership assistance as well as apartment deposit assistance for families with Section 8 vouchers. NEDCO is exploring options to assist youth who are aging out of foster care and into independent living. NEDCO would like to develop cottage housing to provide first time home owner options.</p>		

2	Public Meeting	Non-targeted/ broad community	November 15, 2016. 5 people attended from 4 non-profit agencies and 1 local government. 1 staff person was also present.	Lori Mack talked about the need for working with individuals living in poverty and providing job readiness training, intensive employment and career case management, access to employment skill building, customized job placement, and job retention. The Community Solutions employment program target populations are: residents of HACC, individuals served through Clackamas Womens Services, individuals successfully managing a mental illness, referrals from the Oregon Youth Authority, Clackamas County Social Services, and the long term unemployed. Katie Ullrich discussed Proud Grounds various programs including a home ownership program for low income families. Proud Ground maintains ownership of the land only. Families purchase the house, gain equity and may sell the house to another low income family. Mellani Calvin, asked about possible funding for the Assist Program to help individuals with disabilities apply for social security benefits. The program would include home visits in Clackamas County to meet with individuals and families to complete the application process. Jim Whynot with the City of Gladstone confirmed that he was working with his engineer to review potential street improvement projects and that the city would be submitting an application for CDBG funding. Tina Kennedy asked about the funding for services for veterans in emergency and transitional housing. Funding can cover a 3 year period. Tina's group is working with the County Social Services Division to provide housing to homeless veterans.	All public comments were accepted	
3	Internet Outreach	Non-targeted/ broad community	Survey results	Survey results	All comments in the community	

Sort Order	Mode of Outreach	Target of Outreach	Summary of response/attendance	Summary of comments received	Summary of comments not accepted and reasons	URL (if applicable)
		y Residents of Public and Assisted Housing			surveys were accepted.	

4	Public Meeting	Non-targeted/ broad community	April 7, 2016 Sandy Connect Luncheon which included 15 organizations providing services to people in the rural Sandy Oregon area. Persons were provided with information on the community development program funding as well as the fair housing assessment process to	Several people asked for additional English and Spanish paper surveys to provide to their clients and neighbors.	All comments were accepted and included in the Assessment of Fair Housing report.	
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Sort Order	Mode of Outreach	Target of Outreach	Summary of response/attendance	Summary of comments received	Summary of comments not accepted and reasons	URL (if applicable)
			develop goals.			

**Table 4 – Citizen Participation Outreach**



# Needs Assessment

## NA-05 Overview

### Needs Assessment Overview

Housing Needs Assessment: More than 20,000 households in Clackamas County are “Severely Cost Burdened” due to paying more than 50% of their incomes for housing. Table 10 data indicates that for low-income **renters** that pay more than 50% of their incomes for housing: a total of 10,314 households, 32% are elderly households (3,256 Households) and 37% are small related households (3,781 households). Table 10 also indicates that for low income **home owners** that pay more than 50% of their income for housing: a total of 9,745 households, 39% are elderly households (3,801 Households) and 32% are in small related households (3,078 households).

Disproportionately Greater Need: Extremely low income renters in 8,336 households with incomes in the 0 to 50% of AMI have the greatest need and are most at risk of becoming homeless due to rapidly rising rents and increasing housing market pressure to maximize profits on housing investments.

Public Housing: Residents of public housing live in Milwaukie and Oregon City and Housing Choice voucher holders live throughout the county. Currently there is a general lack of affordable housing for low income households in the jurisdiction and in the region. The rapid increasing in housing demand in the private housing market will continue to gentrify some low income neighborhoods and push low-income families further from high opportunity areas. Public Housing residents and voucher holders are experiencing a lack of ability to move due to the lack of affordable accessible units for rent.

Homeless Needs Assessment: The 208 homeless families living in sheltered in the 2015 homeless count included 194 adults and 256 children. 53 persons were identified as homeless veterans since they reported having served in the U.S. military. Another 1,504 persons were counted as “doubled up” or living in overcrowded conditions due to economic hardship.

Non-homeless needs assessment: Based on a State (OHCS) 2013 Clackamas County Housing profile report, more than 3,000 persons need housing with alcohol and drug rehabilitation services, more than 2,500 persons with chronic mental illness need housing with services, 1,450 persons with developmental disabilities need housing with services, 104 households in danger of domestic violence need housing options, more than 12,500 elder persons need housing, more than 1,000 frail elderly need housing and 256 released offenders need housing units.

The Housing Authority of Clackamas County 2017-2022 Plan waitlist data identified 365 elderly persons that were eligible for housing assistance and 384 households headed by a disabled person that were eligible for housing assistance.

Non-housing community development needs assessment: Public Facility Needs for Clackamas County include Homeless Facilities, Domestic Violence (services) Facilities, Mental Health Facilities, Senior Centers and Abused/Neglected Children Facilities.

Public Improvement Needs identified for Clackamas County include Water/Sewer Improvements, Street/Alley Improvements, Curbs and Sidewalks, Bike and Pedestrian Paths and, Drainage (street) Improvements.

Public Services Needs identified for Clackamas County include Fair Housing Activities, Homeless Services, Youth Services, Neglected/Abused Children Services, Renter/foreclosure training and Employment/Training Services.

## NA-10 Housing Needs Assessment - 24 CFR 91.205 (a,b,c)

### Summary of Housing Needs

More than 20,000 low-income households in Clackamas County are “Severely Cost Burdened” due to paying more than 50% of their incomes for housing.

Table 10 data indicates that for low-income **renters** that pay more than 50% of their incomes for housing: a total of 10,314 households, 32% are elderly households (3,256 Households) and 37% are small related households (3,781 households).

Table 10 also indicates that for low income **home owners** that pay more than 50% of their income for housing: a total of 9,745 households, 39% are elderly households (3,801 Households) and 32% are in small related households (3,078 households).

Demographics	Base Year: 2000	Most Recent Year: 2012	% Change
Population	338,391	383,746	13%
Households	136,954	147,796	8%
Median Income	\$52,080.00	\$64,352.00	24%

**Table 5 - Housing Needs Assessment Demographics**

Data Source: 2000 Census (Base Year), 2008-2012 ACS (Most Recent Year)

### Number of Households Table

	0-30% HAMFI	>30-50% HAMFI	>50-80% HAMFI	>80-100% HAMFI	>100% HAMFI
Total Households *	12,633	14,249	22,180	15,734	83,015
Small Family Households *	3,922	4,615	7,689	6,108	44,964
Large Family Households *	765	924	2,021	1,658	7,160
Household contains at least one person 62-74 years of age	2,266	3,117	5,148	3,761	17,833
Household contains at least one person age 75 or older	1,782	3,420	3,577	1,729	5,698
Households with one or more children 6 years old or younger *	1,992	2,220	3,290	2,459	8,790
* the highest income category for these family types is >80% HAMFI					

**Table 6 - Total Households Table**

Data Source: 2008-2012 CHAS

## Housing Needs Summary Tables

### 1. Housing Problems (Households with one of the listed needs)

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
<b>NUMBER OF HOUSEHOLDS</b>										
Substandard Housing - Lacking complete plumbing or kitchen facilities	374	420	465	130	1,389	60	40	60	35	195
Severely Overcrowded - With >1.51 people per room (and complete kitchen and plumbing)	35	10	60	75	180	0	50	48	49	147
Overcrowded - With 1.01-1.5 people per room (and none of the above problems)	404	613	473	237	1,727	4	118	182	212	516
Housing cost burden greater than 50% of income (and none of the above problems)	5,342	2,994	1,039	240	9,615	3,169	3,082	3,372	1,402	11,025

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
Housing cost burden greater than 30% of income (and none of the above problems)	573	2,404	4,609	975	8,561	487	1,284	3,159	2,938	7,868
Zero/negative Income (and none of the above problems)	468	0	0	0	468	617	0	0	0	617

**Table 7 – Housing Problems Table**

Data 2008-2012 CHAS  
Source:

2. Housing Problems 2 (Households with one or more Severe Housing Problems: Lacks kitchen or complete plumbing, severe overcrowding, severe cost burden)

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
<b>NUMBER OF HOUSEHOLDS</b>										
Having 1 or more of four housing problems	6,142	4,014	2,049	668	12,873	3,229	3,293	3,666	1,698	11,886
Having none of four housing problems	1,267	3,564	8,059	5,125	18,015	891	3,369	8,404	8,219	20,883
Household has negative income, but none of the other housing problems	468	0	0	0	468	617	0	0	0	617

**Table 8 – Housing Problems 2**

Data 2008-2012 CHAS  
Source:

3. Cost Burden > 30%

	Renter				Owner			
	0-30% AMI	>30-50% AMI	>50-80% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	Total
NUMBER OF HOUSEHOLDS								
Small Related	2,598	2,709	2,418	7,725	792	1,262	2,511	4,565
Large Related	492	415	265	1,172	212	271	1,069	1,552
Elderly	1,496	1,687	1,336	4,519	1,696	2,291	2,320	6,307
Other	2,002	1,406	2,097	5,505	977	718	811	2,506
Total need by income	6,588	6,217	6,116	18,921	3,677	4,542	6,711	14,930

Table 9 – Cost Burden > 30%

Data 2008-2012 CHAS  
Source:

4. Cost Burden > 50%

	Renter				Owner			
	0-30% AMI	>30-50% AMI	>50-80% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	Total
NUMBER OF HOUSEHOLDS								
Small Related	2,363	1,074	344	3,781	708	942	1,428	3,078
Large Related	257	115	4	376	182	242	523	947
Elderly	1,359	1,315	582	3,256	1,392	1,389	1,020	3,801
Other	1,824	763	314	2,901	883	604	432	1,919
Total need by income	5,803	3,267	1,244	10,314	3,165	3,177	3,403	9,745

Table 10 – Cost Burden > 50%

Data 2008-2012 CHAS  
Source:

5. Crowding (More than one person per room)

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
NUMBER OF HOUSEHOLDS										
Single family households	404	563	458	243	1,668	4	114	158	236	512
Multiple, unrelated family households	0	50	55	4	109	0	54	72	39	165

	Renter					Owner				
	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	>80-100% AMI	Total
Other, non-family households	50	10	15	65	140	0	0	0	0	0
Total need by income	454	623	528	312	1,917	4	168	230	275	677

**Table 11 – Crowding Information – 1/2**

Data Source: 2008-2012 CHAS

	Renter				Owner			
	0-30% AMI	>30-50% AMI	>50-80% AMI	Total	0-30% AMI	>30-50% AMI	>50-80% AMI	Total
Households with Children Present	2,363	1,074	344	3,781	708	942	1,428	3,078

**Table 12 – Crowding Information – 2/2**

Alternate Data Source Name: Consolidated Plan Table 10

Data Source Comments: Since no other data is available for low income households with children present, Clackamas County uses the assumption that Small Related Households paying more than 50% of their incomes (Cost Burden >50%) as listed in Table 10 is representative of families with children.

**Describe the number and type of single person households in need of housing assistance.**

Single person households may be included in the elderly and small related households – a total of 13,227 renters and 10,872 home owners may need housing assistance. Table 9 data indicates that a total of 18,921 households that are low-income renters pay more than 30% of their incomes for housing. 24% of these households are elderly households (5,502 of the 18,921) and 41% are small related households (7,725 of the 18,921). Table 9 also indicates that for the 14,930 households that are low income home owners that pay more than 30% of their income for housing, 42% are elderly households (6,307 of the 14,930) and 31% are small related households (4,565 of the 14,930).

Table 10 data indicates that for the 10,314 low-income renter households that pay more than 50% of their incomes for housing, 32% are elderly households (3,256 of 10,314) and 37% are small related households (3,781 of 10,314).

Table 10 also indicates that for the 9,745 low income home owner households that pay more than 50% of their income for housing, 39% are elderly households (3,801 of 9,745) and 32% are small related households(3,078 of 9,745). Elderly persons on fixed incomes or single persons on fixed incomes due to disability would be included in these small related households and elderly household percentages.

**Estimate the number and type of families in need of housing assistance who are disabled or victims of domestic violence, dating violence, sexual assault and stalking.**

Table 10 indicates that there were 10,314 renter households with Housing Cost burden of 50% of household incomes. The “Other” category in Table 10 may include disabled person households.

Using that assumption that 50% of households in danger of domestic violence may need housing assistance and 1,225 households contacted the primary provider in 2015, the need would be 612 households. The need could drop to 417 households when subtracting a total of 195 victim of domestic violence households that were provided with housing assistance in emergency shelters in 2015.

In Clackamas County, domestic violence advocates provided direct assistance to over 1000 victims of domestic violence and assisted with over 730 protective orders in 2015. Source: Clackamas County District Attorney’s Office 2015 Annual Report.

The primary provider of domestic violence survivor services in Clackamas County is Clackamas Women’s Services (CWS). 2,431 people in 1,225 households asked for and got support from CWS in 2015 (1,038 adults and 1,393 children). 2,514 people accessed support from CWS in 2014 (985 adults and 1,529 children). Source: Clackamas Women’s Services 2014 and 2015 Annual Reports. Two emergency shelters in Clackamas County provided housing assistance to 196 households that reported domestic violence as a cause for homelessness.

**What are the most common housing problems?**

As indicated in Table 7, the most common housing problems for both renters and owners is the cost burden of greater than 30% of household income and greater than 50%.

Table 7 reveals that 44% of all low income renters with housing problems (9,615 of 21,940) have a greater than 50% of income housing cost burden. 39% of these renters pay more than 30% of their income for housing for a combined total of 89% or 18,176 households that are burdened by housing expenses.

Of all low income owners with housing problems, 54% of these owner households (11,025 of 20,368) are spending more than 50% of household income for housing and 39% (7,868 of 20,368) are paying more than 30% of their incomes for housing related costs. The combined total of low income home owners that are burdened by housing expenses is 93% (18,893 of 20,368) of all owner households reporting housing problems.



### **Are any populations/household types more affected than others by these problems?**

It appears that renters in Elderly households (3,256 of 10,314) and small related households (3,781 of 10,314) renters are more affected by housing problems than the other populations listed in Table 10.

As stated above, Table 10 data indicates that for low-income renters that pay more than 50% of their incomes for housing: a total of 10,314 households, 32% are elderly households and 37% are small related households.

Table 10 also indicates that for low income owners that pay more than 50% of their income for housing: a total of 9,745 households, 39% are elderly households and 32% are small related households. Elderly on fixed incomes or singles with disabilities on fixed incomes due to disability would be included in these percentages.

### **Describe the characteristics and needs of Low-income individuals and families with children (especially extremely low-income) who are currently housed but are at imminent risk of either residing in shelters or becoming unsheltered 91.205(c)/91.305(c)). Also discuss the needs of formerly homeless families and individuals who are receiving rapid re-housing assistance and are nearing the termination of that assistance**

The 5,803 households with 0 to 30% of household area median incomes (extremely low income) represent 56% of all renter households (5,803 of 10,314) paying more than 50% for their housing detailed in Table 10. These extremely low income renter households include elderly households, small related households and large related households that include both individuals and families. 1,359 households are elderly and extremely low income paying more than 50% of their income for housing. These extremely low income renter households are currently house and imminent risk due to one lost paycheck or one unexpected expense away from eviction and homelessness.

Extremely low income households that own their homes are 32% of all owner households that pay more than 50% of their incomes for housing also detailed in Table 10. Of these 3,165 extremely low income home owner households, 1,392 are elderly. A total of 890 home owner households at this income level paying more than 50% for their housing are comprised of small related and large related households.

Formerly homeless individuals and families receiving rapid re-housing services from one agency in Clackamas County in 2015 reported that 535 persons in 195 households were provided with assistance. Of the households served 70% had children, 47% of adults reported that they had been victims of domestic violence, 20% of persons assisted reported having a disability and 9 persons were veterans of military service. (2015 CAPER ESG report)

**If a jurisdiction provides estimates of the at-risk population(s), it should also include a description of the operational definition of the at-risk group and the methodology used to generate the estimates:**

Clackamas County uses a definition of at-risk of homeless aligned with the state of Oregon definition however Clackamas County has no current estimate on any at-risk populations. Clackamas County does operate a Coordinated Housing Assessment system to process requests for homeless assistance. From January 1, 2016 to December 31, 2016, the Coordinated Housing Access System received a total of 4,116 phone calls for assistance. 426 calls were regarding domestic violence assistance, 641 calls were for subsidized housing, 908 calls were requests for homeless prevention and 396 people were calling for affordable housing. A reasonable estimate of an at-risk of homelessness could be 908 households per year based on the requests for assistance.

**Clackamas County uses the same at-risk of homelessness definition as the State of Oregon:**

**Imminent Risk of Homelessness** – household is at imminent risk of homelessness, and will imminently lose primary nighttime residence:

- My residence will be lost within 14 days of the date of application for homeless assistance by court order or the equivalent under applicable state law (formal eviction notice); AND
- I have not identified a subsequent residence; AND
- I lack the resources or support networks needed to obtain other permanent housing

**Unstably Housed** –an individual or family who:

- Is at risk of losing housing, and does not otherwise qualify as homeless under the above listed (1-4) categories, AND:
- Have been notified to vacate current residence or otherwise demonstrate high risk of losing current housing, AND
- Lack the resources and support network to obtain other permanent housing.

**Specify particular housing characteristics that have been linked with instability and an increased risk of homelessness**

Clackamas County Homeless Count data from 2013 and 2015 indicates that households that have one or more of the following characteristics are likely to experience instability and increased risk of homelessness:

- Low-income (High rent),
- unemployment,
- domestic violence,
- disabilities including mental illness,
- substance abuse addiction

## Discussion

Given the rapidly rising cost of rental housing in our area, the greatest issue affecting low income persons and families is the high cost of housing. “No cause” evictions are currently legal in Oregon allowing landlords to give a 30 day notice to all tenants to vacate their homes for no reason other than a landlord’s desire to empty the rental unit. In some cases of property owners wanting to maximize their investments, one bedroom apartment rents have been increased by 100% from \$700 per month to \$1,400 per month. Low income renters have little recourse in these circumstances. This increased market demand for housing is reflected in the number and percentage of households paying more than 50% of their income for housing. The 23,712 number of households paying more than 50% of their incomes for housing as reported in Table 21 are from 2012 Census data. Since 2012, these numbers have only increased due to increasing financial pressure on home owners and increased housing market demands for rental units.

As stated above, Table 10 data indicates that for low-income **renters** that pay more than 50% of their incomes for housing: a total of 10,314 households, 32% are elderly households (3,256 Households) and 37% are small related households (3,781 households). Table 10 also indicates that for low income **home owners** that pay more than 50% of their income for housing: a total of 9,745 households, 39% are elderly households (3,801 Households) and 32% are in small related households (3,078 households).

## NA-15 Disproportionately Greater Need: Housing Problems – 91.205 (b)(2)

Assess the need of any racial or ethnic group that has disproportionately greater need in comparison to the needs of that category of need as a whole.

### Introduction

The Clackamas County population demographics in 2012 were reported in Comprehensive House Affordability Strategy (CHAS) HUD tables as 84.48% White, 7.73% Hispanic, 3.84% Asian or Pacific Islander, 0.74% Black, 0.62% Native American/Non-Hispanic and 0.12% Other/Non-Hispanic.

Disproportionate Housing needs for households in the 0-30% AMI category is that Black (by 0.5%) and Hispanic (by 1.86%) populations are over represented compared to the county general population. In the 30-50% AMI category the Hispanic population is over represented by 1.86%. In the 50-80% AMI category Whites are over represented by 4.75% while Hispanics are underrepresented by 2.7%. In the 80-100% AMI category, Asian and Pacific Islander populations are over represented by 2.28% while Hispanics are under represented by 2% compared to the county general population.

### 0%-30% of Area Median Income

Housing Problems	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	11,647	1,496	1,033
White	9,682	1,402	874
Black / African American	140	0	4
Asian	259	4	65
American Indian, Alaska Native	113	4	0
Pacific Islander	15	0	0
Hispanic	1,115	79	70

**Table 13 - Disproportionally Greater Need 0 - 30% AMI**

Data 2008-2012 CHAS

Source:

\*The four housing problems are:

1. Lacks complete kitchen facilities,
2. Lacks complete plumbing facilities,
3. More than one person per room,
4. Cost Burden greater than 30%

### 30%-50% of Area Median Income

Housing Problems	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	11,072	3,476	0
White	9,394	3,085	0
Black / African American	55	29	0
Asian	230	45	0
American Indian, Alaska Native	85	25	0
Pacific Islander	0	0	0
Hispanic	1,080	220	0

**Table 14 - Disproportionally Greater Need 30 - 50% AMI**

Data 2008-2012 CHAS  
Source:

\*The four housing problems are:

1. Lacks complete kitchen facilities,
2. Lacks complete plumbing facilities,
3. More than one person per room,
4. Cost Burden greater than 30%

### 50%-80% of Area Median Income

Housing Problems	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	13,272	10,237	0
White	11,843	9,401	0
Black / African American	44	50	0
Asian	319	138	0
American Indian, Alaska Native	59	60	0
Pacific Islander	20	10	0
Hispanic	704	457	0

**Table 15 - Disproportionally Greater Need 50 - 80% AMI**

Data 2008-2012 CHAS  
Source:

\*The four housing problems are:

1. Lacks complete kitchen facilities,
2. Lacks complete plumbing facilities,
3. More than one person per room,
4. Cost Burden greater than 30%

## 80%-100% of Area Median Income

Housing Problems	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	5,720	9,672	0
White	4,805	8,645	0
Black / African American	50	55	0
Asian	350	159	0
American Indian, Alaska Native	105	44	0
Pacific Islander	0	50	0
Hispanic	330	369	0

**Table 16 - Disproportionally Greater Need 80 - 100% AMI**

Data 2008-2012 CHAS  
Source:

\*The four housing problems are:

1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than one person per room, 4. Cost Burden greater than 30%

### Discussion

Disproportionate Housing Needs for populations with “one or more of four housing problems” including having a housing cost burden that is more than 30% of the household income are listed in **Tables 13-16**. **Table 13** lists the number of households with incomes that have extremely low income (extreme poverty) are represented by household incomes that are 0-30% of Area Median Income (AMI) were 83.1% White which is 1.38% less than 84.48% of Whites in the county jurisdiction. The Hispanic population in this income level with housing problems were 9.6% of the population which is 1.86% higher than the 7.73% of Hispanics in the county. The Black population represents 1.2% of the 0-30% AMI population which is 0.46% higher than the 0.74% of the county population that is Black. The combined Asian and Pacific Islander population is 2.4% which is 1.44% lower than the 3.84% of the county population. The American Indian population with housing problems at the 0-30% AMI level is 0.97% which is 0.35% higher than the 0.62% in the county.

**30 to 50%** - Disproportionate Housing Needs for populations with housing problems listed in **Table 14** with incomes that are low income are represented by household incomes that are 30-50% AMI were 84.84% White which is 0.36% more than 84.48% of Whites in the county jurisdiction. The Hispanic population in this income level with housing problems were 9.75% of the population which is 2.02% higher than the 7.73% of Hispanics in the county. The Black population represents 0.5% of the 30-50% AMI population which is 0.24% lower than the 0.74% of the county population that is Black. The combined Asian and Pacific Islander population is 2.08% which is 1.76% lower than the 3.84% of the

county population. The American Indian population with housing problems at the 30-50% AMI level is 0.77% which is 0.15% higher than the 0.62% in the county.

**50 to 80%** - Disproportionate Housing Needs for populations with housing problems listed in **Table 15** with household incomes that are 50-80% AMI were 89.23% White which is 4.75% more than 84.48% of Whites in the county jurisdiction. The Hispanic population in this income level with housing problems were 5.03% of the population which is 2.7% lower than the 7.73% of Hispanics in the county. The Black population represents 0.33% of the 50-80% AMI population which is 0.41% lower than the 0.74% of the county population that is Black. The combined Asian and Pacific Islander population is 2.55% which is 1.29% lower than the 3.84% of the county population. The American Indian population with housing problems at the 50-80% AMI level is 0.44% which is 0.18% lower than the 0.62% in the county.

**80-100%** - Disproportionate Housing Needs for populations with housing problems listed in **Table 16** with household incomes that are 80-100% AMI were 84% White which is 0.48% less than 84.48% of Whites in the county jurisdiction. The Hispanic population in this income level with housing problems were 5.77% of the population which is 1.96% lower than the 7.73% of Hispanics in the county. The Black population represents 0.87% of the 80-100% AMI population which is 0.13% more than the 0.74% of the county population that is Black. The combined Asian and Pacific Islander population is 6.12% which is 2.28% more than the 3.84% of the county population. The American Indian population with housing problems at the 80-100% AMI level is 1.84% which is 1.22% higher than the 0.62% in the county.

## NA-20 Disproportionately Greater Need: Severe Housing Problems – 91.205 (b)(2)

Assess the need of any racial or ethnic group that has disproportionately greater need in comparison to the needs of that category of need as a whole.

### Introduction

This HUD Comprehensive Housing Affordability Strategy (CHAS) table displays housing cost burden levels of No Cost Burden: less than 30% of household income spent on housing, Cost Burden: 30-50% of household income is spent on housing and, Severe Cost Burden: more than 50% of household income is spent on housing. The Clackamas County general population racial and ethnic demographics in 2012 were reported in HUD CHAS tables as 84.48% White, 7.73% Hispanic, 3.84% Asian or Pacific Islander, 0.74% Black, 0.62% Native American/Non-Hispanic and 0.12% Other/Non-Hispanic.

Housing Cost Burdens in Clackamas County is that the white population has a higher percentage of Cost Burden and Severe Cost Burden (2.84% and 2.93% more than 84.48% of the county population) than other racial and ethnic groups. The next largest ethnic group is the Hispanic population that appears to have a lower rate of Cost Burden and Severe Cost Burden however this measure may be a function of who responded to the data collection surveys at a higher rate. The Hispanic population has increased at a higher rate since 2012 in the jurisdiction as well.

### 0%-30% of Area Median Income

Severe Housing Problems*	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	10,173	2,966	1,033
White	8,518	2,567	874
Black / African American	140	0	4
Asian	209	54	65
American Indian, Alaska Native	73	44	0
Pacific Islander	15	0	0
Hispanic	950	244	70

**Table 17 – Severe Housing Problems 0 - 30% AMI**

Data 2008-2012 CHAS  
Source:

\*The four severe housing problems are:

1. Lacks complete kitchen facilities,
2. Lacks complete plumbing facilities,
3. More than 1.5 persons per room,
4. Cost Burden over 50%



### 30%-50% of Area Median Income

Severe Housing Problems*	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	6,687	7,833	0
White	5,749	6,713	0
Black / African American	25	54	0
Asian	95	180	0
American Indian, Alaska Native	30	80	0
Pacific Islander	0	0	0
Hispanic	586	724	0

**Table 18 – Severe Housing Problems 30 - 50% AMI**

Data 2008-2012 CHAS  
Source:

\*The four severe housing problems are:

1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than 1.5 persons per room, 4. Cost Burden over 50%

### 50%-80% of Area Median Income

Severe Housing Problems*	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	5,702	17,812	0
White	4,988	16,277	0
Black / African American	10	84	0
Asian	149	303	0
American Indian, Alaska Native	29	90	0
Pacific Islander	20	10	0
Hispanic	439	728	0

**Table 19 – Severe Housing Problems 50 - 80% AMI**

Data 2008-2012 CHAS  
Source:

\*The four severe housing problems are:

1. Lacks complete kitchen facilities, 2. Lacks complete plumbing facilities, 3. More than 1.5 persons per room, 4. Cost Burden over 50%

## 80%-100% of Area Median Income

Severe Housing Problems*	Has one or more of four housing problems	Has none of the four housing problems	Household has no/negative income, but none of the other housing problems
Jurisdiction as a whole	2,062	13,330	0
White	1,533	11,893	0
Black / African American	40	65	0
Asian	160	349	0
American Indian, Alaska Native	75	74	0
Pacific Islander	0	50	0
Hispanic	205	494	0

**Table 20 – Severe Housing Problems 80 - 100% AMI**

Data 2008-2012 CHAS  
Source:

\*The four severe housing problems are:

1. Lacks complete kitchen facilities,
2. Lacks complete plumbing facilities,
3. More than 1.5 persons per room,
4. Cost Burden over 50%

## Discussion

Per HUD guidance: “A disproportionately greater need exists when members of a racial or ethnic group at a given income level experience housing problems at a greater rate (10% points or more) than the income level as a whole.”

**Table 21** lists the number of renter and owner households with no cost burden spending less than 30% (<30%) of their household incomes on housing. The 90,738 total number of <30% no cost burden households were 90.7% White which is 6.22% more than 84.48% of Whites in the county jurisdiction. The Hispanic population in the <30% cost burden level were 3.80% of the population which is 3.93% lower than the 7.73% of Hispanics in the county. The Black population represents 0.5% of the no cost burden which is 0.24% lower than the 0.74% of the county population that is Black. The combined Asian and Pacific Islander population with no cost burden (less than 30%) level are 2.77% which is 1.07% lower than the 3.84% of the county population. The American Indian population at the no cost burden level is 0.36% which is 0.26% lower than the 0.62% in the county.

**30-50% Housing Cost Burden - Table 21** lists the number of renter and owner households with housing cost burden at 30-50% of their household incomes. A total of 30,765 households were cost burdened with 30-50% of incomes spent on housing expenses. Of these cost burdened households, 87.32% were White which is 2.84% more than 84.48% of Whites in the county jurisdiction. The Hispanic population in this cost burdened level were 3.80% of the population which is 3.93% lower than the 7.73% of Hispanics

in the county. The Black population represents 0.70% of the cost burdened level which is 0.04% lower than the 0.74% of the county population that is Black. The combined Asian and Pacific Islander population at the cost burdened level are 3.35% which is 0.49% lower than the 3.84% of the county population. The American Indian population at the cost burdened level is 0.55% which is 0.07% lower than the 0.62% in the county.

**Severe Cost Burden - More than 50% of income - Table 21** lists the number of renter and owner households in Clackamas County with severe housing cost burdens spending more than 50% of their incomes on housing. A total of 23,712 households were at the severe cost burden level. Of these households, 87.41% were White which is 2.93% more than 84.48% of Whites in the county jurisdiction. The Hispanic population at the severe cost burden level were 5.85% of the population which is 1.88% lower than the 7.73% of Hispanics in the county. The Black population represents 0.63% of the severe cost burdened population which is 0.11% lower than the 0.74% of the county population that is Black. The combined Asian and Pacific Islander population at the severe cost burdened level are 2.98% which is 0.86% lower than the 3.84% of the county population. The American Indian population at the severe cost burden level is 0.79% which is 0.17% lower than the 0.62% in the county.

## NA-25 Disproportionately Greater Need: Housing Cost Burdens – 91.205 (b)(2)

Assess the need of any racial or ethnic group that has disproportionately greater need in comparison to the needs of that category of need as a whole.

### Introduction:

Disproportionate Housing Needs – Severe Housing Needs for households in the 0-30% AMI category is that Black (by 1.38%) and Hispanic (by 1.61%) populations are over represented compared to the county general population. In the 30-50% AMI category the Hispanic population is over represented by 1.03%. In the 50-80% AMI category Whites are over represented by 3% while Asian and Pacific Islanders are underrepresented by 0.88%. In the 80-100% AMI category, Asian and Pacific Islander populations are over represented by 3.92% while Hispanics are over represented by 2.21% compared to the county general population.

### Housing Cost Burden

Housing Cost Burden	<=30%	30-50%	>50%	No / negative income (not computed)
Jurisdiction as a whole	90,738	30,765	23,712	1,129
White	82,300	26,863	20,727	974
Black / African American	455	214	150	4
Asian	2,335	1,030	693	65
American Indian, Alaska Native	324	170	188	0
Pacific Islander	180	0	15	0
Hispanic	3,452	1,975	1,388	70

**Table 21 – Greater Need: Housing Cost Burdens AMI**

Data 2008-2012 CHAS  
Source:

### Discussion:

Per HUD guidance: “A disproportionately greater need exists when members of a racial or ethnic group at a given income level experience housing problems at a greater rate (10% points or more) than the income level as a whole.”

**Table 21** lists the number of renter and owner households with no cost burden spending less than 30% (<30%) of their household incomes on housing. The 90,738 total number of <30% no cost burden households were 90.7% White which is 6.22% more than 84.48% of Whites in the county

jurisdiction. The Hispanic population in the <30% cost burden level were 3.80% of the population which is 3.93% lower than the 7.73% of Hispanics in the county. The Black population represents 0.5% of the no cost burden which is 0.24% lower than the 0.74% of the county population that is Black. The combined Asian and Pacific Islander population with no cost burden (less than 30%) level are 2.77% which is 1.07% lower than the 3.84% of the county population. The American Indian population at the no cost burden level is 0.36% which is 0.26% lower than the 0.62% in the county.

**30-50% Housing Cost Burden - Table 21** lists the number of renter and owner households with housing cost burden at 30-50% of their household incomes. A total of 30,765 households were cost burdened with 30-50% of incomes spent on housing expenses. Of these cost burdened households, 87.32% were White which is 2.84% more than 84.48% of Whites in the county jurisdiction. The Hispanic population in this cost burdened level were 3.80% of the population which is 3.93% lower than the 7.73% of Hispanics in the county. The Black population represents 0.70% of the cost burdened level which is 0.04% lower than the 0.74% of the county population that is Black. The combined Asian and Pacific Islander population at the cost burdened level are 3.35% which is 0.49% lower than the 3.84% of the county population. The American Indian population at the cost burdened level is 0.55% which is 0.07% lower than the 0.62% in the county.

**Severe Cost Burden - More than 50% of income - Table 21** lists the number of renter and owner households in Clackamas County with severe housing cost burdens spending more than 50% of their incomes on housing. A total of 23,712 households were at the severe cost burden level. Of these households, 87.41% were White which is 2.93% more than 84.48% of Whites in the county jurisdiction. The Hispanic population at the severe cost burden level were 5.85% of the population which is 1.88% lower than the 7.73% of Hispanics in the county. The Black population represents 0.63% of the severe cost burdened population which is 0.11% lower than the 0.74% of the county population that is Black. The combined Asian and Pacific Islander population at the severe cost burdened level are 2.98% which is 0.86% lower than the 3.84% of the county population. The American Indian population at the severe cost burden level is 0.79% which is 0.17% lower than the 0.62% in the county.

## **NA-30 Disproportionately Greater Need: Discussion – 91.205(b)(2)**

### **Are there any Income categories in which a racial or ethnic group has disproportionately greater need than the needs of that income category as a whole?**

Extremely low income renters with incomes in the 0 to 80% of AMI have the greatest need and are most at risk of becoming homeless due to rapidly rising rents and increasing housing market pressure to maximize profits on housing investments. The Hispanic population with Housing Problems and Severe Housing Problems at the 0 to 50% of AMI are 1 to 2% more represented in this category than the jurisdiction's general Hispanic population of 7.73%. The white population is over represented by 3 to 4% in the 50-80% of AMI population with Housing Problems and Severe Housing Problems compared to the 84.48% of the white population in the county.

### **If they have needs not identified above, what are those needs?**

No other needs have been identified.

### **Are any of those racial or ethnic groups located in specific areas or neighborhoods in your community?**

Clackamas County has 218 Census Tract Block Groups. Of those 218 block groups, ten percent (10%) or 22 block groups have a population that is more than 56% low and moderate income (LMI).

According to the Census Bureau 7.73% of Clackamas County residents identified their ethnicity as Hispanic or Latino in the 2010 census.

2010 Census data on ethnicity of County residents indicates that of the more populated cities, Canby and Molalla had the highest percentages of Hispanic/Latino residents (21% and 14% respectively). Among the cities with populations above 10,000 people, Canby, Happy Valley and Wilsonville had greater than 20% minority populations.

Clackamas County Housing and Community Development Division reviewed both race and ethnic information from the 2010 Census Bureau to determine minority ranking. The 22 block groups with the highest minority ranking represent 10 percent of all the block groups in Clackamas County.

Nine (9) block groups rank in the top 22 for both minority and LMI, and represent the block groups with the highest concentrations (HC) of poverty and minorities. Five (5) of the high LMI concentration (HC) block groups are located in the North Clackamas Area along HWY 205. One (1) of the HC block groups is

in Milwaukie and two (2) of the HC block groups are in Canby. A total of 13, 855 people live in these areas of High Concentrations (HC) of minority and low income persons.

## NA-35 Public Housing – 91.205(b)

### Introduction

The geographic area of the Housing Authority of Clackamas County (HACC) is the same geographic area as the county jurisdiction. HACC wait list data for 2017 indicated that although 7,892 person applied to be added to the Public Housing Waitlist only 3,629 were added to the waitlist. 35% of current public housing residents have a disability according to Census data provided by HUD. 28% of households on the 2015 wait list had a disabled family member. 84% of the households (984 families) added to the waitlist were extremely low income (Less than 30% of AMI). 33.3% of the households added (365 families) to the waitlist were in elderly households. 384 families (34%) reported having a disabled head of household.

HACC maintains 545 units of public housing, 1561 Section 8 vouchers providing rental assistance to low income households, 264 units of private market housing, over 100 other housing units in various projects including farmworker housing and 51 Veteran's Administration VASH Vouchers. Based on the table below 541 of the 545 households in public housing have requested accessibility features and 106 of th epeople in public housing are elderly.

### Totals in Use

	Program Type								
	Certificate	Mod-Rehab	Public Housing	Vouchers			Special Purpose Voucher		
				Total	Project - based	Tenant - based	Veterans Affairs Supportive Housing	Family Unification Program	Disabled *
# of units vouchers in use	0	0	541	1,549	0	1,479	5	0	65

**Table 22 - Public Housing by Program Type**

\*includes Non-Elderly Disabled, Mainstream One-Year, Mainstream Five-year, and Nursing Home Transition

Data Source: PIC (PIH Information Center)



## Characteristics of Residents

	Program Type							
	Certificate	Mod-Rehab	Public Housing	Vouchers			Special Purpose Voucher	
				Total	Project - based	Tenant - based	Veterans Affairs Supportive Housing	Family Unification Program
Average Annual Income	0	0	12,319	11,830	0	11,906	5,889	0
Average length of stay	0	0	7	6	0	6	1	0
Average Household size	0	0	2	2	0	2	1	0
# Homeless at admission	0	0	0	0	0	0	0	0
# of Elderly Program Participants (>62)	0	0	106	347	0	340	1	0
# of Disabled Families	0	0	210	525	0	463	3	0
# of Families requesting accessibility features	0	0	541	1,549	0	1,479	5	0
# of HIV/AIDS program participants	0	0	0	0	0	0	0	0
# of DV victims	0	0	0	0	0	0	0	0

**Table 23 – Characteristics of Public Housing Residents by Program Type**

**Data Source:** PIC (PIH Information Center)

## Race of Residents

Race	Certificate	Mod-Rehab	Public Housing	Program Type					
				Vouchers			Special Purpose Voucher		
				Total	Project - based	Tenant - based	Veterans Affairs Supportive Housing	Family Unification Program	Disabled *
White	0	0	500	1,427	0	1,359	4	0	64
Black/African American	0	0	21	71	0	71	0	0	0
Asian	0	0	9	13	0	12	0	0	1
American Indian/Alaska Native	0	0	10	36	0	35	1	0	0
Pacific Islander	0	0	1	2	0	2	0	0	0
Other	0	0	0	0	0	0	0	0	0

\*includes Non-Elderly Disabled, Mainstream One-Year, Mainstream Five-year, and Nursing Home Transition

**Table 24 – Race of Public Housing Residents by Program Type**

Data Source: PIC (PIH Information Center)

## Ethnicity of Residents

Ethnicity	Certificate	Mod-Rehab	Public Housing	Program Type					
				Vouchers			Special Purpose Voucher		
				Total	Project - based	Tenant - based	Veterans Affairs Supportive Housing	Family Unification Program	Disabled *
Hispanic	0	0	36	67	0	66	0	0	1
Not Hispanic	0	0	505	1,482	0	1,413	5	0	64

\*includes Non-Elderly Disabled, Mainstream One-Year, Mainstream Five-year, and Nursing Home Transition

**Table 25 – Ethnicity of Public Housing Residents by Program Type**

**Data Source:** PIC (PIH Information Center)

**Section 504 Needs Assessment: Describe the needs of public housing tenants and applicants on the waiting list for accessible units:**

The Housing Authority of Clackamas County (HACC) (PHA) currently has 35% of public housing residents with a disability according to Census data provided by HUD. The PHA housing needs analysis is based on the HACC public housing Waiting List data from the 2015 Annual Plan. 4,109 Households requested Housing Choice Vouchers and Public Housing. 86% of households (3,528 households) were extremely low income households with incomes of less than 30% of the Area Median Income. 28% of households on the wait list had a disabled family member. 28% of households on the wait list (754 households) were requesting a one-bedroom unit, 21% requested a two-bedroom unit, 862 households or 32% requested a three bedroom unit and, 20% requested a unit with at least 4 bed-rooms.

**Most immediate needs of residents of Public Housing and Housing Choice voucher holders**

471 households are on the public housing waitlist (2016). 706 households are on the waiting list for Housing Choice Vouchers. Residents of public housing and Housing Choice voucher holders are distributed throughout the county. Currently there is a general lack of affordable housing for low income households in the jurisdiction and in the region. The rapid increasing in housing demand in the private housing market will continue to gentrify some low income neighborhoods and push low-income families further from high opportunity areas. Public Housing residents and voucher holders are experiencing a lack of ability to move due to the lack of affordable accessible units for rent.

The 2016 PHA waitlist had 84% of the households (984 families) that were extremely low income (Less than 30% of AMI). 33.3% of the households were (365 families) in elderly households. 384 families (34%) reported having a disabled head of household.

The PHA goals for 2017 to 2022 detail the following goals as the immediate needs of PHA residents:

1. Develop new housing units with long-term affordability for a broad range of low-income households with an emphasis on dispersal of affordable housing.
2. Improve access & housing choice for everyone, with a focus on protected classes and single parent households.
3. Enforce Fair Housing laws and increase public understanding of Fair Housing laws.
4. Improve the quality of Housing Authority assisted housing and customer service.
5. Improve the community quality of life and economic vitality.

6. Promote self-sufficiency and asset development of families and individuals.

### **How do these needs compare to the housing needs of the population at large**

Residents of public housing and Housing Choice voucher holders have similar housing needs to the population at large who are low-income, elderly and/or disabled. County residents and residents of the Portland Metro region are expressing frustration over the lack of affordable, accessible rental and home ownership housing units.

Public Housing residents would like to have more opportunities for increasing their incomes, providing educational opportunities for their children and getting services for their families.

### **Discussion**

A recent regional Metro Housing Equity 2016 Report detailed the lack of affordable housing units referenced as “missing middle” housing units. “There are currently approximately 30,000 income-restricted units of housing regulated to remain affordable to households making less than 60 percent of median income, and approximately 73,000 units of market-rate housing that are affordable at this level (although rising rents will cause this number to diminish) in the four-county metro region. With over 185,000 households making less than 60 percent of median income, that leaves a shortage of more than 80,000 units of affordable housing.” *Metro Opportunities and challenges for equitable housing, January 2016* website: [oregonmetro.gov/equitablehousing](http://oregonmetro.gov/equitablehousing).

## NA-40 Homeless Needs Assessment – 91.205(c)

### Introduction:

Most of the population in Clackamas County lives in urban areas. There are also homeless persons and families camping and living in the several small towns in rural areas and in a very large rural forested area that is part of a national forest. The Homeless Continuum of Care (CoC) covers the entire geographic area of Clackamas County.

The 2013 Homeless Count found that 2,070 persons were homeless in Clackamas County. The 2015 Homeless Count found that 2,196 persons were homeless; a 6% increase since 2013. Adults with disabilities accounted for 56% of all homeless persons served by homeless programs and services. Adults with disabilities assisted by permanent support housing programs and services were 85% of all adults assisted. The 2015 homeless count was conducted by 213 trained volunteers at 134 different sites.

### Homeless Needs Assessment

Population	Estimate the # of persons experiencing homelessness on a given night		Estimate the # experiencing homelessness each year	Estimate the # becoming homeless each year	Estimate the # exiting homelessness each year	Estimate the # of days persons experience homelessness
	Sheltered	Unsheltered				
Persons in Households with Adult(s) and Child(ren)	0	138	0	0	0	0
Persons in Households with Only Children	0	0	0	0	0	0
Persons in Households with Only Adults	0	16	0	0	0	0
Chronically Homeless Individuals	0	2	0	0	0	0
Chronically Homeless Families	0	1	0	0	0	0
Veterans	0	0	0	0	0	0

Population	Estimate the # of persons experiencing homelessness on a given night		Estimate the # experiencing homelessness each year	Estimate the # becoming homeless each year	Estimate the # exiting homelessness each year	Estimate the # of days persons experience homelessness
	Sheltered	Unsheltered				
Unaccompanied Child	0	7	0	0	0	0
Persons with HIV	0	0	0	0	0	0

**Table 26 - Homeless Needs Assessment**

**Data Source Comments:** 2016 Continuum of Care Point in Time Count of sheltered homeless persons conducted in January 2016.

Indicate if the homeless population is:  Has No Rural Homeless

**If data is not available for the categories "number of persons becoming and exiting homelessness each year," and "number of days that persons experience homelessness," describe these categories for each homeless population type (including chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth):**

Accurate information on the number of persons becoming homeless each year and leaving homelessness is not clearly available due to the multiple sources of varying information including: the CoC Homeless Count, the Coordinated Housing Assess, the CoC Homeless Management Information system and the number of people seeking services directly from churches, social services agencies and homeless services providers.

607 persons were housed in CoC homeless assistance programs, using data from the county's Homeless Management Information System for Jan 1, 2016 to Dec 30, 2016. Of these persons, 229 people or 38% left homeless services. 145 persons or 63% of all leavers left for permanent housing, 76 persons or 33% of all leavers moved to other temporary housing, 4 persons left to move to an institution and 4 persons went to other destinations.





**Nature and Extent of Homelessness: (Optional)**

<b>Race:</b>	<b>Sheltered:</b>	<b>Unsheltered (optional)</b>
White	504	0
Black or African American	31	0
Asian	5	0
American Indian or Alaska Native	21	0
Pacific Islander	7	0
<b>Ethnicity:</b>	<b>Sheltered:</b>	<b>Unsheltered (optional)</b>
Hispanic	96	0
Not Hispanic	523	0

Data Source

Comments:

2015 CoC Homeless Point in Time Count

**Estimate the number and type of families in need of housing assistance for families with children and the families of veterans.**

The 208 homeless families living in shelters and transitional housing during the 2015 homeless count included 194 adults and 256 children. 53 persons were identified as homeless veterans since they reported having served in the U.S. military. Another 1,504 persons were counted as “doubled up” or living in overcrowded conditions due to economic hardship.

ADD NEW DATA from 2017 count HERE....

**Describe the Nature and Extent of Homelessness by Racial and Ethnic Group.**

The 2015 count found that 43% of the homeless population did not want to provide their race or ethnic identity. 45% reported they were white, 4% identified as American Indian, 2% identified as Black, 2% identified as Asian or Pacific Islander, 4% identified as Hispanic.

ADD NEW DATA from 2017 count HERE....

**Describe the Nature and Extent of Unsheltered and Sheltered Homelessness.**

Children accounted for 47% of persons that were homeless or in unstable housing. Young adults age 18 to 24 were 11% of homeless persons counted. Elderly persons age 65 and older were only 2% of the homeless population. Chronically homeless persons in Clackamas County were predominantly male between 40 and 64 years old. The gender of chronically homeless persons was 34% female and 66% male.

ADD NEW DATA from 2017 count HERE....

**Discussion:**

No additional discussion. Discuss trends.....2013, 2015 and 2017 data

## **NA-45 Non-Homeless Special Needs Assessment - 91.205 (b,d)**

### **Introduction:**

Clackamas County Social Services is a division within the larger Clackamas County Health, Housing and Human Services Department that includes Behavioral Health, Public Health, Health Centers, Community Development, the Housing Authority, Community Solutions (workforce programs) and Children Youth and Families.

Clackamas County Social Services (CCSS) was created through the merger of the Area Agency on Aging and the Community Action Agency. The Area Agency on Aging (AAA) and the Community Action Agency (CAA) combine advocacy, program coordination and development activities with social programs to provide opportunities and services for the elderly, people with disabilities, low-income persons, rural residents, and communities of color in Clackamas County. In addition to being an AAA and a Community Action Agency, CCSS includes the County Developmental Disability Program, the County Veterans Service Office, and the Volunteer Connection.

Clackamas County is not a HOPWA grantee. The City of Portland which is just to the north of Clackamas County receives HOPWA funding for the entire region.

The County Department of Transportation and Development (DTD) recently completed an assessment of ADA accessibility needs on all county roadways. The ADA TRANSITION PLAN FOR PUBLIC RIGHTS OF WAY Assessment found that 1,917 Locations had a missing curb ramp, 1,352 locations had a non-functional curb ramp, 1,476 locations failed to meet standards and only 132 ramps met ADA standards.

### **Describe the characteristics of special needs populations in your community:**

2012 American Community Survey (ACS) data for Clackamas County (AFH HUD Table 14) showed that there were 3,478 persons between the ages of 5 and 17 with disabilities. 21,334 persons between the ages of 18-64 had disabilities and 18,738 people over the age of 65 had disabilities.

2012 ACS data for Clackamas County (AFH HUD Table 13 Disability Type) also showed that 14,405 people had hearing difficulty, 5,906 people had vision difficulty, 16,721 people had cognitive difficulty, 21,985 people had ambulatory (mobility) difficulty, 9,217 people had self-care difficulty and 14,826 people had difficulty living independently.

Clackamas County's overall population has grown, and there has been a significant increase in the number of older adults residing in the County. Portland State University Population Research Center estimates the 2016 population of those aged 65 and older to be 66,529, an increase of 17,368 people. In addition to increasing in number, the percentage of older adults has also increased.

According to US Census Bureau estimates, Clackamas County's population of seniors has grown from 18 percent in 2010 to 22 percent, including those aged 85 and over, which is slightly higher, up from 7,409 to 7,693.

The percentage of Hispanic and Latino residents aged 60 and older has increased from 1.7 percent to 2.2 percent. The overall Hispanic population has also increased, from 7.7 percent to 8.4 percent. The 4.5 percent of older adults who identify as non-white include 239 African Americans, 267 Native Americans, and 1,437 Asians.

The overall number of people living below the poverty line is slightly higher in 2016 than it was in the 2010 census, as is the number of people aged 60 and older living in poverty, which has increased from 4,139 to 5,603. This means that 6.6 percent of the people 60 and older in Clackamas County live below the poverty level.

The number of people with a disability has declined since the last Area Plan in all age groups except for those aged 65 and older, which increased from 18,717 to 19,692.

In the FY15-16 service year, the ADRC received 1,672 calls from 1,135 unduplicated callers. Through our Oregon Project Independence program, we provided services to 232 older adults and had a waiting list of 351 people.

### **What are the housing and supportive service needs of these populations and how are these needs determined?**

Based on a State (OHCS) 2013 Clackamas County Housing profile report:

- over 3,000 persons need housing with alcohol and drug rehabilitation services,
- over 2,500 persons with chronic mental illness need housing with services,
- 1,450 persons with developmental disabilities need housing with services,
- 104 households in danger of domestic violence need housing options,
- more than 12,500 elder persons need housing,
- more than 1,000 frail elderly need housing and
- 256 released offenders need housing units.

The Housing Authority of Clackamas County 2017-2022 Plan waitlist identified 365 elderly persons that were eligible for housing assistance and 384 households headed by a disabled person that were eligible for housing assistance.

The goal of the Area Agency on Aging is to provide services, supports and information that allow older adults (and in some cases depending on program guidelines, younger persons with disabilities) to live independently through direct programming, contracting with other organizations, engaging in regional

collaboration, and planning efforts. The primary planning document that is used by the AAA to guide its work is the Area Plan.

The Area Plan describes how CCSS will meet the needs of older adults and persons with disabilities living in Clackamas County, and includes demographic information, a needs assessment, and specific goals and activities for a number of areas that are critical to the population, including Caregiver Services, Transportation and Legal Services.

In order to serve older adults residing in both urban and rural areas of the county, Clackamas County Social Services (CCSS) utilizes a single entry approach, working with a comprehensive network of ten Senior, Adult or Community Centers, to ensure that every older adult in Clackamas County has easy access to information and services.

The Clackamas Resource Connection, an Aging and Disability Resource Center (ADRC), provides additional services for all residents of Clackamas County. In 2013 the Clackamas Resource Connection became part of the regional Metro Aging and Disability Resource Connection and was renamed the Clackamas Aging and Disability Resource Connection.

**Discuss the size and characteristics of the population with HIV/AIDS and their families within the Eligible Metropolitan Statistical Area:**

The county jurisdiction population with HIV/AIDS was identified as 321 persons by state (OHCS) reports in 2013. HIV/AIDS services and housing is provided in the Portland Metropolitan area by the Cascades Aids Project: <http://www.cascadeaids.org/>

**Discussion:**

Persons with mobility disabilities including elderly persons continue to face barriers to housing and services in their communities. Rural communities and low-income urban areas lack resources to build sidewalks, pedestrian crossings and other accessible infrastructure for persons with disabilities. The jurisdiction does fund some infrastructure projects including installation of accessible sidewalks in low-income rural areas in the jurisdiction on a limited basis. Cities in urban areas of the jurisdiction are also re-building streets and sidewalks to include accessible sidewalks and crosswalks.

## **NA-50 Non-Housing Community Development Needs – 91.215 (f)**

### **Describe the jurisdiction’s need for Public Facilities:**

Clackamas County is a large and diverse county, covering 1,879 square miles with 15 incorporated cities and towns, as well numerous unincorporated communities. The more urbanized northern section of the county contrasts sharply with the rural and frontier nature of the southern and eastern portions of the county. These were identified as High Needs for Clackamas County: Homeless Facilities, Domestic Violence (services) Facilities, Mental Health Facilities, Senior Centers and Abused/Neglected Children Facilities.

### **How were these needs determined?**

A community survey of cities and the general public was conducted in September and October of 2016. Public Facilities Needs were identified through community surveys, public housing resident surveys, and public meetings with community groups.

### **Describe the jurisdiction’s need for Public Improvements:**

The following public improvements were identified as High Public Improvements Needs for Clackamas County: Water/Sewer Improvements, Street/Alley Improvements, Curbs and Sidewalks, Bike and Pedestrian Paths and, Drainage (street) Improvements.

### **How were these needs determined?**

A community survey of cities and the general public was conducted in September and October of 2016. Public Improvement Needs were identified through community surveys, public housing resident surveys, surveys of city planning staff and public meetings with community groups.

### **Describe the jurisdiction’s need for Public Services:**

The need assessment conducted in October and November of 2016 included a community survey of cities, th egeneral public and public housing residents. Fair Housing Activities, Homeless Services, Youth

Services, Neglected/Abused Children Services, Renter/foreclosure training and Employment/Training Services were identified as High Needs.

**How were these needs determined?**

A community survey of cities and the general public was conducted in September and October of 2016. Public Services Needs were identified through community surveys, public housing resident surveys and public meetings with community groups.

# Housing Market Analysis

## MA-05 Overview

### Housing Market Analysis Overview:

The Portland metropolitan region that includes the Clackamas County jurisdiction is experiencing an increase in demand for housing due to an influx of new residents. By some estimates over 100,000 people are moving to the Portland Metro area every year. This current demand for housing is causing rapid rent increases and forcing low-income households to look for housing in other parts of the region including Clackamas County.

A regional report: the Metro Housing Equity 2016 Report concluded that there is currently a shortage of 80,000 “missing middle” housing units in the region: “There are currently approximately 30,000 income-restricted units of housing regulated to remain affordable to households making less than 60 percent of median income, and approximately 73,000 units of market-rate housing that are affordable at this level (although rising rents will cause this number to diminish) in the four-county metro region. With over 185,000 households making less than 60 percent of median income, that leaves a shortage of more than 80,000 units of affordable housing.”



## MA-10 Number of Housing Units – 91.210(a)&(b)(2)

### Introduction

Clackamas County residential properties are 69% single family detached residential units, 4% single unit attached, 4% apartments in 2-4 units, 9% apartments in 5-19 unit developments, 7% in larger 20 or more apartment units and 7% of the housing units are mobile homes, boats, recreational vehicles (RV campers) or vans. The housing market in Clackamas County is under increasing economic pressure due to an influx of persons moving to the region. The region experienced a housing market stagnation during the 2009-2010 economic downturn which caused many foreclosures and halted most housing construction.

Since 2010 the housing market has re-bounded into a high demand market that is causing a rapid increase in rents and housing costs. Most of the housing in Clackamas County is in good condition since most was built after 1980.

### All residential properties by number of units

Property Type	Number	%
1-unit detached structure	109,015	69%
1-unit, attached structure	6,897	4%
2-4 units	6,779	4%
5-19 units	14,455	9%
20 or more units	11,232	7%
Mobile Home, boat, RV, van, etc	10,544	7%
<b>Total</b>	<b>158,922</b>	<b>100%</b>

**Table 27 – Residential Properties by Unit Number**

Data Source: 2008-2012 ACS

### Unit Size by Tenure

	Owners		Renters	
	Number	%	Number	%
No bedroom	172	0%	1,635	4%
1 bedroom	1,628	2%	9,875	21%
2 bedrooms	13,181	13%	19,810	43%
3 or more bedrooms	86,443	85%	15,052	32%
<b>Total</b>	<b>101,424</b>	<b>100%</b>	<b>46,372</b>	<b>100%</b>

**Table 28 – Unit Size by Tenure**

Data Source: 2008-2012 ACS

**Describe the number and targeting (income level/type of family served) of units assisted with federal, state, and local programs.**

The county jurisdiction is partly within an urban growth boundary that encourages preservation of rural agricultural land and density of residential areas. The state of Oregon (OHCS) maintains a list of assisted housing units in Clackamas County. A total of 2,719 assisted housing units in 49 locations are located in the county jurisdiction not including public housing units. 112 of these assisted units are targeted for alcohol and drug recovery, 176 are for persons with disabilities, 813 units for elders, 1,618 for low income families.

**Provide an assessment of units expected to be lost from the affordable housing inventory for any reason, such as expiration of Section 8 contracts.**

Three of the twelve Section 8 contract properties in Clackamas County have contract expiration dates between 2017 and 2021. If all three of these Section 8 properties are sold there may be a loss of up to 125 units of affordable housing. Three properties have contracts that will expire in 2022 and six have contracts that extend to or beyond 2030.

48 units with a contract expiring on 11/3/2019 are at the OREGON CITY TERRACE at 600 May street in Oregon City.

25 units with a contract expiring on 12/31/2020 are at 300 MAIN at 300 SE Main Street in Estacada.

52 units with a contract expiring on 8/31/2020 are at WILLAMALANE at 4707 SE Boardman Avenue in Milwaukie.

**Does the availability of housing units meet the needs of the population?**

The needs of low income families, elders and persons with disabilities far outweighs the housing availability. Only 6.3% of the 2,678 persons in Clackamas County with chronic mental illness identified in the State of Oregon study in 2013 had housing available to them leaving a gap of 2,509 units.

Only 5.5% of the 1,554 persons with developmental disabilities had housing available leaving a gap of 1,469 units. Only 15.9% of the frail elderly had housing available leaving a gap of 1,316 units.

In the three years since 2013 these needs have not been met by development of assisted housing units. In some cases low-income units may have been lost to expiring contracts and sale to private investors for re-sale of affordable housing units.

### **Describe the need for specific types of housing:**

As the population ages many more small affordable accessible units are needed for low income persons. The market trends are pushing more housing development of larger homes and luxury apartments. The largest gap identified in 2013 was the 6.5% of the elderly with available housing leaving a gap of 12,909 units however some of these households may not be low income.

As mentioned earlier in this plan, there is a general lack of affordable housing for low income households. More than 20,000 households with extremely low incomes of less than 30% of AMI are paying more than 50% of their incomes for housing.

### **Discussion**

A recent Assessment of Fair Housing (2017-2021) report established a jurisdictional goal of constructing 500 new units of affordable (rent restricted units) housing over the next 5 years in areas of high opportunity as well as adoption of a Strategic Housing Plan that includes developing revenue sources for construction of affordable housing projects. While this goal of 500 new units is far from the 20,000 needed units, more affordable and accessible housing in the jurisdiction will directly benefit low-income households, vulnerable populations and protected classes. Affordable housing units once completed will include eligibility requirements for low income and disabled persons. Affordable housing development organizations will be required to reach out to protected classes and vulnerable low income populations in the jurisdiction.

## MA-15 Housing Market Analysis: Cost of Housing - 91.210(a)

### Introduction

The cost of housing in the Clackamas County jurisdiction has been increasing along with all other housing in the Portland Metropolitan area due to economic pressures generated by an influx of people moving into the area. The housing trends are to build bigger homes for the private market and to build luxury apartments to maximize real estate investments.

Non-profit housing developers are struggling to secure Low Income Housing Tax Credits to finance affordable housing units due to recent changes at the federal level. The public housing authority has been allowed to pay above the fair market rent in some areas yet many Housing Choice Vouchers (HCV) have been returned because no affordable units could be found. The rental housing inventory has a vacancy rate of less than 2% according to an apartment owners' association report in Spring 2016.

### Cost of Housing

	Base Year: 2000	Most Recent Year: 2012	% Change
Median Home Value	193,700	300,600	55%
Median Contract Rent	632	858	36%

Table 29 – Cost of Housing

Data Source: 2000 Census (Base Year), 2008-2012 ACS (Most Recent Year)

Rent Paid	Number	%
Less than \$500	5,439	11.7%
\$500-999	25,571	55.1%
\$1,000-1,499	10,441	22.5%
\$1,500-1,999	2,904	6.3%
\$2,000 or more	2,017	4.4%
<b>Total</b>	<b>46,372</b>	<b>100.0%</b>

Table 30 - Rent Paid

Data Source: 2008-2012 ACS

### Housing Affordability

% Units affordable to Households earning	Renter	Owner
30% HAMFI	1,407	No Data
50% HAMFI	4,936	3,001
80% HAMFI	22,263	8,660
100% HAMFI	No Data	16,895
<b>Total</b>	<b>28,606</b>	<b>28,556</b>

**Table 31 – Housing Affordability**

Data Source: 2008-2012 CHAS

**Monthly Rent**

Monthly Rent (\$)	Efficiency (no bedroom)	1 Bedroom	2 Bedroom	3 Bedroom	4 Bedroom
Fair Market Rent	886	1,021	1,208	1,757	2,109
High HOME Rent	682	793	944	1,208	1,328
Low HOME Rent	643	689	827	955	1,066

**Table 32 – Monthly Rent**

Data Source: HUD FMR and HOME Rents

**Is there sufficient housing for households at all income levels?**

The cost of home ownership has increased by 55% and the cost of rental housing has increased by 36% in the county since the year 2000. These housing cost measures are from 2012 data. The cost of housing has continued to increase since 2012. As stated earlier over 20,000 households are paying more than 50% of their income for housing. The region has a shortage of 80,000 affordable rental units.

**How is affordability of housing likely to change considering changes to home values and/or rents?**

The affordability of market rate housing will likely decline in the next few years due to increased market demand for housing units by people moving to the Portland Metropolitan area.

“Overall rents in the Metro area have seen an increase of 13% year-over-year, but additional supply has caused rent increases to slow to 5.3% since the Fall Report, indicating an annualized increase closer to 10%” per year. Source: Multifamily Northwest, The Apartment Report, Spring 2016

**How do HOME rents / Fair Market Rent compare to Area Median Rent? How might this impact your strategy to produce or preserve affordable housing?**

HOME rents and Fair Market Rents are low compared to Area median Rent. Rents have been rising throughout the Portland metropolitan area. The jurisdiction needs to both preserve affordable housing units and seek additional funds to build new affordable and accessible housing units for low-income households.

The jurisdiction will continue to seek partners to develop affordable housing and to preserve existing affordable housing units. The jurisdiction has a limited source of affordable housing funds (\$700,000 per

year of HOME funds) that is being reduced annually by the federal government. The jurisdiction is developing a Strategic Housing Plan that will include possible funding sources for new affordable housing units.

ADD more HERE

## **Discussion**

A recent news article in the Oregonian on March 13, 2017 highlighted 13 neighborhoods in the Portland metro area that were termed "severely rent burdened". One of these neighborhoods (census tract 0215 block group 001) was located in the North Clackamas Park area along Highway 224 between Milwaukie and Happy Valley. The neighborhood is considered middle-income and mostly homeowners. 26% of the homes are rental properties in which 57% of residents spend more than half of their incomes on rent. The median rental housing cost was \$1,538 per month.

## MA-20 Housing Market Analysis: Condition of Housing – 91.210(a)

### Introduction

Clackamas County is primarily single family residential homes. Multi-family housing is located in high-density urban areas. Rural towns have some multi-family housing units and manufactured home parks as well. As indicated in Table 33 below, 49% of the owner-occupied single family homes and 44% of the renter-occupied homes were built after 1980. Only 12% of the owner-occupied homes and 9% of the renter-occupied homes were built before 1950. Very few private homes are vacant and the rental vacancy rate is less than 2%.

A search of the state of Oregon Oregon’s Dwelling Park Directory list in February 2017 found 101 MFH Parks with MFH 6,287 units in Clackamas County with few vacancies. The MFH Parks listed were generally for families or limited to Seniors (55 yrs+) with no children.

### Definitions

Clackamas County administers a Housing Rehabilitation Program. The program manual includes a definition of Substandard. A substandard dwelling unit is one that does not meet the HUD Housing Quality Standards at CFR 882.109 or other criteria for an acceptable standard of living. The substandard conditions may be due to the age of unit, neglect, inadequate plumbing facilities, crowded conditions or other code violations.

Substandard but Suitable for Rehabilitation: dwelling unit is considered suitable for rehabilitation if it is structurally sound and can be brought up to standard condition within the cost limits of the Housing Rehabilitation Program.

Substandard not Suitable for Rehabilitation: dwelling unit is considered unsuitable for rehabilitation if it is deteriorated to the extent that rehabilitation is not economically feasible within the cost limits of the Housing Rehabilitation Program and the financial means of the owner.

### Condition of Units

Condition of Units	Owner-Occupied		Renter-Occupied	
	Number	%	Number	%
With one selected Condition	32,648	32%	20,864	45%
With two selected Conditions	820	1%	2,239	5%
With three selected Conditions	98	0%	99	0%
With four selected Conditions	0	0%	13	0%
No selected Conditions	67,858	67%	23,157	50%
<b>Total</b>	<b>101,424</b>	<b>100%</b>	<b>46,372</b>	<b>100%</b>

Table 33 - Condition of Units

Data Source: 2008-2012 ACS

## Year Unit Built

Year Unit Built	Owner-Occupied		Renter-Occupied	
	Number	%	Number	%
2000 or later	16,717	16%	6,466	14%
1980-1999	32,961	33%	18,686	40%
1950-1979	39,960	39%	16,840	36%
Before 1950	11,786	12%	4,380	9%
<b>Total</b>	<b>101,424</b>	<b>100%</b>	<b>46,372</b>	<b>99%</b>

**Table 34 – Year Unit Built**

Data Source: 2008-2012 CHAS

## Risk of Lead-Based Paint Hazard

Risk of Lead-Based Paint Hazard	Owner-Occupied		Renter-Occupied	
	Number	%	Number	%
Total Number of Units Built Before 1980	51,746	51%	21,220	46%
Housing Units build before 1980 with children present	12,335	12%	7,601	16%

**Table 35 – Risk of Lead-Based Paint**

Data Source: 2008-2012 ACS (Total Units) 2008-2012 CHAS (Units with Children present)

## Vacant Units

	Suitable for Rehabilitation	Not Suitable for Rehabilitation	Total
Vacant Units	0	0	0
Abandoned Vacant Units	0	0	0
REO Properties	0	0	0
Abandoned REO Properties	0	0	0

**Table 36 - Vacant Units**

Data Source: 2005-2009 CHAS

## Need for Owner and Rental Rehabilitation

The Clackamas County Housing Rehabilitation Program assists 35 to 40 home owners every year with home repair loans and home access grants. As stated earlier, over 20,000 households in the county are paying more than 50% of their incomes for housing. Low income elderly and low income disabled households will income qualify for housing rehabilitation assistance. 32,648 owner-occupied housing units have been identified as having at least one problem/condition representing 32% of all owner occupied housing units. 20,864 renter occupied units have been identified as having at least one condition/problem representing 45% of all renter occupied units.



As indicated in Table 7, the most common housing problems for both renters and owners is the cost burden of greater than 30% of household income and greater than 50%. Of all low income owners with housing problems, 54% of these owner households (11,025 of 20,368) are spending more than 50% of household income for housing and 39% (7,868 of 20,368) are paying more than 30% of their incomes for housing related costs. The combined total of low income home owners that are burdened by housing expenses is 93% (18,893 of 20,368) of all owner households reporting housing problems.

### **Estimated Number of Housing Units Occupied by Low or Moderate Income Families with LBP Hazards**

HUD established estimates for the likelihood of lead-based paint based on the age of units: 90% of units built prior to 1940, 80% for units built between 1940 and 1959 and 62% of units built between 1960 and 1979. However, the presence of lead-based paint (LBP) alone is not a direct indication of lead-based paint hazard. Hazard is a function of several factors, including age and condition.

Recent surveys have attempted to provide a more accurate estimate of lead-based paint hazards. A 1999 national survey found declining chances of hazards with new buildings: 67% for housing build before 1940, 51% for houses built between 1940 and 1959, 10% for houses built between 1960 and 1977, and 1% for houses built after that.

Source: Clickner, R. et. al. (2001). *National Survey of Lead and Allergens in Housing, Final Report, Volume 1: Analysis of Lead Hazards*. Report to Office of Lead Hazard Control, US Department of Housing and Urban Development.

Table 34 Risk of Lead-Based Paint (LBP) Hazard indicates that 12% of the owner-occupied units have children present, a total of 12,335 housing units and 16% of the renter-occupied units have children present for a total of 7,601 units. The combined number of housing units built before 1980 with children present would be 19,936 units that could be at risk of LBP hazard.

The number of households in the county listed in Table 6 with incomes below 100% of Household Area Median Family Income (HAMFI) is 8,790 households. If we use an assumption that 75% of these households are in LBP hazard units then the number would be 6,593 low-income households at risk.

### **Discussion**

A review of single and multi-family new housing building permits from January 2006 to June 2016 reveals that 3,435 permits were issued for single family homes throughout the jurisdiction while 220 permits were issued for multi-family homes of duplexes, 3 or 4 family unit developments and developments with 5 or more units. 47.7% of the multi-family permits (105 permits) were issued in the Clackamas zip code which is an area South of Happy Valley, east of Hwy 205 and north of the Clackamas

River. 11.4% of multi-family permits (25 permits) were issued in Molalla and another 11.4% (25 permits) were issued in Milwaukie.

Of the 3,435 single family permits issued in ten years, 16.51% were issued in the Clackamas zip code (567 permits). 408 permits were issued in Oak Grove/Jennings lodge zip code (11.9% of single family permits). Oregon City had 298 permits issued or 8.68% of the total, Canby had 282 permits issued 8.21% of the total and, Molalla had 246 permits issued 7.16% of all single family permits. The communities with over 100 single family permits each included: Sandy (187), Estacada (167), Boring (146), Happy Valley (125), West Linn (109), and Damascus (110). The housing permits data provided by the county transportation and planning department.

## MA-25 Public and Assisted Housing – 91.210(b)

### Introduction

The Housing Authority of Clackamas County (HACC) manages 560 units of public housing. This housing portfolio is organized and managed in five separate projects as noted in the table below. All public units are leased to qualified households earning less than 80% of the area median income. Rents are income based where a household pays only 30% of its adjusted monthly income. Public housing is restricted to families, single parent households, elderly and disabled persons. Based on a waiting list of about 5,000 households, the demand for public housing is about five times the supply of qualified units.

### Totals Number of Units

	Program Type								
	Certificate	Mod-Rehab	Public Housing	Vouchers					
				Total	Project -based	Tenant -based	Special Purpose Voucher		
							Veterans Affairs Supportive Housing	Family Unification Program	Disabled *
# of units vouchers available			560	1,486			0	0	663
# of accessible units									
*includes Non-Elderly Disabled, Mainstream One-Year, Mainstream Five-year, and Nursing Home Transition									

Table 37 – Total Number of Units by Program Type

Data Source: PIC (PIH Information Center)

**Describe the supply of public housing developments:**

**Describe the number and physical condition of public housing units in the jurisdiction, including those that are participating in an approved Public Housing Agency Plan:**

There are 544 units of public housing and scattered sites owned by the housing authority that are part of the public housing agency plan. Chronic under funding of the capital improvement grants from HUD has made maintaining these units extremely difficult. The housing authority applied for a HOPE VI grant from HUD to re-develop many of these units however that grant request was not funded.

The Housing Authority of Clackamas County (HACC) manages 560 units of public housing. This housing portfolio is organized and managed in five separate projects as noted in the table below. All public units are leased to qualified households earning less than 80% of the area median income. Rents are income based where a household pays only 30% of its adjusted monthly income. Public housing is restricted to families, single parent households, elderly and disabled persons.

Based on a waiting list of about 5,000 households, the demand for public housing is about five times the supply of qualified units.

## Public Housing Condition

Public Housing Development	Average Inspection Score
Clackamas Heights	38
Scattered Sites	38
Hillside Park	38
Oregon City View Manor	38
Hillside Manor	38

Table 38 - Public Housing Condition

### Describe the restoration and revitalization needs of public housing units in the jurisdiction:

A comprehensive third party capital assessment completed in February of 2106 by EMG, Inc., indicated that the long term capital needs for all projects exceed the annual funding stream by three to four times the amount of available funding. For example, the long term capital needs for Clackamas Heights are about \$121,441 per unit but funding through HUD's capital grant program is only projected be approximately \$31,250 per unit.

To provide a context for the capital needs identified above, projects 1000 & 3000 were constructed in 1943 and have been rehabilitated several times. The construction type although adequate to meet or exceed minimum HUD condition standards these projects have far exceeded their useful life.

### Describe the public housing agency's strategy for improving the living environment of low- and moderate-income families residing in public housing:

Based on the capital needs of the public housing inventory described above, the Housing Authority of Clackamas County (HACC) is in the process of studying the feasibility of redevelopment of all projects except for the Scattered Sites. The Scattered Sites are in good condition and have the potential for long term viability. HACC is considering the redevelopment of all its public housing sites other than the Scattered Sites. HACC expects to complete a strategic plan for redevelopment sometime during 2017.

The PHA goals for 2017 to 2022 detail the following goals as the immediate needs of PHA residents:

1. Develop new housing units with long-term affordability for a broad range of low-income households with an emphasis on dispersal of affordable housing.
2. Improve access & housing choice for everyone, with a focus on protected classes and single parent households.

3. Enforce Fair Housing laws and increase public understanding of Fair Housing laws.
4. Improve the quality of Housing Authority assisted housing and customer service.
5. Improve the community quality of life and economic vitality.
6. Promote self-sufficiency and asset development of families and individuals.

**Discussion:**

## MA-30 Homeless Facilities and Services – 91.210(c)

### Introduction

The County jurisdiction is also one Continuum of Care region (OR-507). The 2016 total inventory of year-round beds for homeless persons includes 162 beds for households without children, 316 beds for households with children for a total of 478 beds. The 348 permanent supportive housing beds in the chart below include 76 rapid re-housing beds. CoC 2016 Housing Inventory Chart provided these homeless facility numbers.

### Facilities and Housing Targeted to Homeless Households

	Emergency Shelter Beds		Transitional Housing Beds	Permanent Supportive Housing Beds	
	Year Round Beds (Current & New)	Voucher / Seasonal / Overflow Beds	Current & New	Current & New	Under Development
Households with Adult(s) and Child(ren)	40	0	73	203	0
Households with Only Adults	4	0	13	145	0
Chronically Homeless Households	0	0	0	0	0
Veterans	0	0	0	0	0
Unaccompanied Youth	0	0	0	0	0

**Table 39 - Facilities and Housing Targeted to Homeless Households**

Data Source Comments: 2016 Continuum of Care Housing Inventory Chart (HIC).

**Describe mainstream services, such as health, mental health, and employment services to the extent those services are used to complement services targeted to homeless persons**

Oregon is a Medicaid Expansion state. The county homeless services providers in the Continuum of Care (CoC) collaborate extensively with partners County Health Centers, Oregon Health Plan (OHP), Cover Oregon, Oregon Health Authority, Volunteers in Medicine, VA Medical, and employers to ensure that homeless participants are enrolled in both Medicaid (OHP) and private-pay insurance at affordable rates. Between 10/1/2014 and 9/30/2015, 90% of adult participants who exited CoC programs or remained in programs (stayers) had health insurance. This rate has held at 90% for 2 years. CoC programs also assist participants with referrals to Medicaid/Medicare related programs such as SHIBA for Medicare Part D enrollment, filling out Medicare extra help forms and securing in-home care. One outcome resulting from partnership with VA Medical is that the VASH Social worker stationed at Clackamas County Veterans Service Office helped 30 homeless veterans in FY 15-16 become vested and enroll in VA health care and/or co-enroll in OHP for dental coverage.

**List and describe services and facilities that meet the needs of homeless persons, particularly chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth. If the services and facilities are listed on screen SP-40 Institutional Delivery Structure or screen MA-35 Special Needs Facilities and Services, describe how these facilities and services specifically address the needs of these populations.**

Seasonal Facilities: The County works with several faith-based agencies and non-profit agencies to provide services to homeless persons. In the winter months when the temperature drops below freezing, 5 Severe Weather Warming Shelters provided 107 beds mostly for adults and 25 beds for homeless women and children.

Emergency Shelters: 2 church based shelters provide 3 beds for homeless families and The Annie Ross House provides 10 beds for 5 homeless families.

Clackamas Women's Services provides 29 beds for people in danger of domestic violence.

Transitional Housing Services: 5 facilities provide 33 total units of transitional housing: 8 units for homeless families, 3 units for people fleeing domestic violence, 6 units for single adults or households without children, 9 units for pregnant or parenting youth ages 16 to 21 and, 7 units for homeless youth ages 18-23.

Rapid Re-Housing (permanent supportive housing): 2 agencies provide 23 units for families and 12 units for homeless veterans. 10 units are under development to start in October 2017.

Permanent Supportive Housing: 185 units

Bridges to Housing provides homeless families with 25 units of housing per year.



Clackamas Women's Services PSH provides people fleeing domestic and sexual violence with 4 units of housing.

Chez Ami provides clean and sober homeless adults with mental health needs 40 units of housing.

HOPE Programs provide chronically homeless adults and families, some veterans with 19 units of housing.

Shelter + Care provides 43 households with chronically homeless adults and families

Avalon provides 6 units of clean and sober women, some with children, justice involved.

Housing our Heroes provides chronically homeless veteran households with 18 units of housing.

Veterans Rental Assistance Program provides homeless or high risk veterans with serious mental health issues 30 units of housing.

## **MA-35 Special Needs Facilities and Services – 91.210(d)**

### **Introduction**

Special needs services and facilities including housing are provided by non-profit service agencies, faith-based organizations and county agencies including the Social Services Division, the Behavioral Health Division, the Housing Authority (HACC) and the homeless Continuum of Care providers.

### **Including the elderly, frail elderly, persons with disabilities (mental, physical, developmental), persons with alcohol or other drug addictions, persons with HIV/AIDS and their families, public housing residents and any other categories the jurisdiction may specify, and describe their supportive housing needs**

The needs of low income families, elders and persons with disabilities far outweighs the housing availability.

Only 6.3% of the 2,678 persons in Clackamas County with chronic mental illness identified in the State of Oregon (OHCS) study in 2013 had housing available to them leaving a gap of 2,509 units.

Only 5.5% of the 1,554 persons with developmental disabilities had housing available leaving a gap of 1,469 units.

Only 15.9% of the frail elderly had housing available leaving a gap of 1,316 units.

In the three years since 2013 these needs have not been met by development of assisted housing units.

The Behavioral Health Division staff coordinate special needs housing and services for a total of 391 persons. 35 persons living in 7 Adult Foster Homes are funded by Medicaid. Behavioral Health also works with 11 homes that provide 72 person with care in Residential Treatment Homes/Facilities also funded by Medicaid. Behavioral Health Division staff also coordinate services for 284 persons living in supportive housing units funded by a combination of Continuum of Care, HUD 811 , Section 8 and state mental health funding.

Social Services Division staff provide services to 2,167 youth and adults living independantly or in group homes for persons with developmental disabilities.

### **Describe programs for ensuring that persons returning from mental and physical health institutions receive appropriate supportive housing**

**Foster Care Discharge Policy:** The Oregon Department of Human Services (DHS), dictates the Foster Care Discharge Policy in Clackamas County. DHS refers willing children to a CoC homeless services provider for a Life Skills/Transition Readiness Assessment.

The assessment provides: 1. Identification of resources and linkages needed to assist the child in transitioning to independent living, including life skills training, housing subsidies, college tuition, and health insurance; and 2. Preparation of an individualized Comprehensive Transition Plan which must be approved by a Family Court Judge every 6 months until the child is successfully transitioned to independent living. Youth can access Chafee rental subsidies to help them secure an apartment as well as tuition-free access to a state college along with Chafee grants to assist with room and board. Youth with developmental disabilities and/or mental illness exiting the foster care system continue to receive an array of services including options such as adult foster care and supported housing that are based on unique client needs.

**Health Care:** Discharge planning for low income and disabled people is dictated by the State of Oregon through the Medicaid program. The Affordable Care Act (ACA) and the expansion of Oregon's Medicaid program has shifted discharge planning to Coordinated Care Organizations (CCOs) covering Clackamas County. The CCOs integrate physical, mental and dental health services. The ACA Medicaid expansion aligns the financial incentives with clinical outcomes/housing status of patients.

Upon discharge, homeless persons could go to a variety of housing situations: 1. Medical foster home, a family or friend's home with wrap-around in-home services, a licensed residential care, an assisted living facility or a nursing home, depending on level of medical need; 2. Substance abuse treatment; 3. Mental health housing; 4. Shelter or rapid rehousing program.

**Mental Health:** The Discharge Policy for persons being discharged from a mental health facility is ensured by Clackamas County Behavioral Health Department (CCBH). As part of Health Share, the area's Medicaid Coordinated Care Organization, CCBH has both financial and clinical incentives to ensure that no county residents are discharged from a psychiatric hospital without housing and services.

**Corrections:** Successful community re-entry for inmates is a local mandate spearheaded by the Clackamas County Sheriff's Office (CCSO) which participates on the homeless CoC governing board. CCSO promotes post-discharge services with housing to reduce recidivism. The Clackamas County Behavioral Health (CCBH) is a provider in the local Medicaid program, Health Share. CCBH understands that successful re-entry will reduce incidence and cost of ER visits and hospitalization. Two full time mental health professionals on-site at the jail identify and treat inmates with behavioral health issues. Mental Health and Drug Courts provide diversion options for inmates with psychiatric and/or addictions problems. Housing, treatment and close supervision are offered through these Court programs. Newly funded by the State's Reentry Reinvestment Fund, services for persons with mental illness and/or addictions who are exiting jail are being augmented with: 2 case managers, one bilingual addictions counselor, peer counselors, a nurse practitioner and short term transitional housing.

**Specify the activities that the jurisdiction plans to undertake during the next year to address the housing and supportive services needs identified in accordance with 91.215(e) with respect to persons who are not homeless but have other special needs. Link to one-year goals. 91.315(e)**

In the 2017 program year, Clackamas County will fund the following housing projects and supportive services for non-homeless persons:

- WeBuild - a project to design and build a roadway to a multi-family housing development for adults with disabilities.
- Housing Rehabilitation program will fund housing improvements for renters and owners with disabilities
- Pleasant Avenue Veterans Housing - a project to build 22 units of housing for formerly homeless veterans and their families.
- Employment investment program employment training for persons with disabilities and persons in public housing.
- HOME Multifamily Housing project will provide some housing units to persons with disabilities.

**For entitlement/consortia grantees: Specify the activities that the jurisdiction plans to undertake during the next year to address the housing and supportive services needs identified in accordance with 91.215(e) with respect to persons who are not homeless but have other special needs. Link to one-year goals. (91.220(2))**

See previous answer.

## **MA-40 Barriers to Affordable Housing – 91.210(e)**

### **Negative Effects of Public Policies on Affordable Housing and Residential Investment**

The majority of resident feedback during Assessment of Fair Housing community meetings was that most people liked where they lived, however, many people including persons with disabilities felt that it was very difficult to find another affordable unit should they want to move. Current state law provides a mechanism to ensure that a certain percentage of new development is reserved for low-income tenants (known as “inclusionary housing” or “inclusionary zoning”). Clackamas will be evaluating the feasibility and the various options for implementing inclusionary zoning within the county.

The Low Income Housing Tax Credit (LIHTC) market has come to a screeching halt due to potential tax policy changes at the federal level. Clackamas County relies on the State of Oregon LIHTC Program which recently provided this guidance to all proposed affordable housing projects: State of Oregon OHCS decision....letter dated 2/10/2017...

“anticipated federal corporate tax reform has negatively impacted the LIHTC equity market creating real-time consequences for the 33 multifamily affordable housing projects in the OHCS "pipeline". These projects have received funding reservations based on tax credit pricing that is no longer available. Among projects facing probable gaps are a large number of 4% LIHTC projects, as well as the 9% LIHTC projects that the Housing Stability Council approved in November 2016.”

“Do not issue a 2017 LIHTC and HOME NOFA and instead fund additional 2016 applications, reserving some credits for gaps in 9% LIHTC pipeline projects and use flexible gap funding resources to help fill funding gaps on as many pipeline projects as possible”

Zoning Issues: Multi-family housing developments are typically restricted to areas that are zoned as high or medium density residential in each community and throughout the jurisdiction. Communities have many requirements for multifamily housing including: amenities such as onsite parking, fire access, buildings that “match” the character of the neighborhood and traffic impact studies, etc. All these requirements of multifamily housing projects increase the initial cost and result in affordable housing that is expensive to build and maintain. The State of Oregon has a land use plan (Goal 10) that requires all communities to allocate land for multifamily developments however some communities are more compliant than others. State and regional housing advocates are beginning to challenge communities to meet the Goal 10 requirements to provide land for multi-family housing developments. In 2015 Housing Land Advocates joined the Coalition for Affordable and Safe Housing to repeal Oregon’s ban on inclusionary zoning, and allow Oregon communities access to this important tool for creating affordable housing in areas of opportunity. The ban was lifted in 2016 with the passage of HB1533 which became effective June 2, 2016.



## MA-45 Non-Housing Community Development Assets – 91.215 (f)

### Introduction

The unemployment rate has dropped from 10.9% in 2012 to the current rate of 3.6 in the third quarter of 2016 based on a HUD PD&R 3Q 2016 report. 58% of the Labor force commutes for less than 30 minutes to get work. Major business activity and employment sectors include; Education and Health Care Services, Retail Trade and Manufacturing. The labor force of over 200,000 persons is well educated with over 110,000 people with some college or a Bachelor’s degree or higher.

### Economic Development Market Analysis

#### Business Activity

Business by Sector	Number of Workers	Number of Jobs	Share of Workers %	Share of Jobs %	Jobs less workers %
Agriculture, Mining, Oil & Gas Extraction	3,327	3,520	2	3	1
Arts, Entertainment, Accommodations	16,468	14,363	11	11	0
Construction	11,514	10,470	8	8	0
Education and Health Care Services	24,787	21,741	17	17	0
Finance, Insurance, and Real Estate	9,659	7,372	7	6	-1
Information	3,555	1,963	2	2	0
Manufacturing	17,803	18,214	12	14	2
Other Services	6,791	6,321	5	5	0
Professional, Scientific, Management Services	15,824	11,113	11	9	-2
Public Administration	0	0	0	0	0
Retail Trade	19,902	19,256	14	15	1
Transportation and Warehousing	5,529	4,241	4	3	-1
Wholesale Trade	10,448	11,568	7	9	2
Total	145,607	130,142	--	--	--

**Table 40 - Business Activity**

**Data Source:** 2008-2012 ACS (Workers), 2011 Longitudinal Employer-Household Dynamics (Jobs)



## Labor Force

Total Population in the Civilian Labor Force	200,174
Civilian Employed Population 16 years and over	179,584
Unemployment Rate	10.29
Unemployment Rate for Ages 16-24	26.97
Unemployment Rate for Ages 25-65	6.82

**Table 41 - Labor Force**

Data Source: 2008-2012 ACS

Occupations by Sector	Number of People
Management, business and financial	47,882
Farming, fisheries and forestry occupations	7,225
Service	17,125
Sales and office	49,200
Construction, extraction, maintenance and repair	15,922
Production, transportation and material moving	9,169

**Table 42 – Occupations by Sector**

Data Source: 2008-2012 ACS

## Travel Time

Travel Time	Number	Percentage
< 30 Minutes	94,560	58%
30-59 Minutes	56,600	35%
60 or More Minutes	10,625	7%
<b>Total</b>	<b>161,785</b>	<b>100%</b>

**Table 43 - Travel Time**

Data Source: 2008-2012 ACS

## Education:

### Educational Attainment by Employment Status (Population 16 and Older)

Educational Attainment	In Labor Force		Not in Labor Force
	Civilian Employed	Unemployed	
Less than high school graduate	8,853	1,404	4,556

Educational Attainment	In Labor Force		Not in Labor Force
	Civilian Employed	Unemployed	
High school graduate (includes equivalency)	31,552	3,658	10,950
Some college or Associate's degree	57,372	5,807	16,642
Bachelor's degree or higher	53,991	3,446	11,583

**Table 44 - Educational Attainment by Employment Status**

Data Source: 2008-2012 ACS

### Educational Attainment by Age

	Age				
	18–24 yrs	25–34 yrs	35–44 yrs	45–65 yrs	65+ yrs
Less than 9th grade	406	991	1,599	1,990	1,747
9th to 12th grade, no diploma	3,743	3,267	2,416	4,550	3,487
High school graduate, GED, or alternative	10,654	10,463	10,420	25,277	16,537
Some college, no degree	11,188	13,478	13,792	33,694	14,881
Associate's degree	1,526	4,026	4,356	10,491	2,607
Bachelor's degree	2,642	8,897	12,202	25,218	9,086
Graduate or professional degree	267	2,946	5,765	14,028	6,645

**Table 45 - Educational Attainment by Age**

Data Source: 2008-2012 ACS

### Educational Attainment – Median Earnings in the Past 12 Months

Educational Attainment	Median Earnings in the Past 12 Months
Less than high school graduate	24,789
High school graduate (includes equivalency)	32,132
Some college or Associate's degree	36,766
Bachelor's degree	54,244
Graduate or professional degree	64,779

**Table 46 – Median Earnings in the Past 12 Months**

Data Source: 2008-2012 ACS

### Based on the Business Activity table above, what are the major employment sectors within your jurisdiction?

Major employment sectors in Clackamas County as indicated in Table 39 include; Education and Health Care Services with 21,741 jobs/24,787 workers, Retail Trade with 19,256 jobs/19,902 workers,

Manufacturing with 18,214 jobs/17,803 workers, Arts, Entertainment and Accommodations with 14,363 jobs/16,468 workers. The next three business activities have between 10,000 and 12,000 jobs which are Wholesale Trade, Professional, Scientific, Management Services and Construction.

The employment rate for Clackamas County listed in the Labor Force Table above has dropped to 3.6% in the third quarter of 2016 based on a HUD PD&R 3Q 2016 report.

**Describe the workforce and infrastructure needs of the business community:**

The Clackamas Workforce Partnership 2016 annual report detailed that 7,245 adults searched for employment opportunities through the Worksource Clackamas System. 85% of participants were able to secure employment with an average wage of \$15.20 per hour. 87% were able to maintain the employment for at least 9 months after being hired. 10% of the adult workers had no high school diploma or GED. 9% had a criminal history. 8% were veterans and 5% had a disability.

The business community workforce needs include: a larger pool of trained, flexible and motivated workers.

Infrastructure needs for the business community includes industrial land to locate businesses and manufacturing as well as roads and bridges to transport goods.

**Describe any major changes that may have an economic impact, such as planned local or regional public or private sector investments or initiatives that have affected or may affect job and business growth opportunities during the planning period. Describe any needs for workforce development, business support or infrastructure these changes may create.**

As the Portland metropolitan area increases its population over the next 5 years, housing and transportation challenges will impact how the economy and the business community grows. The state of Oregon continues to debate how best to improve public transportation and the federal highways, particularly the Interstate Highway 5 bridge crossing between Oregon and Washington.

Clackamas County government has asked that voters approve a gasoline tax to raise revenue for road maintenance.

**How do the skills and education of the current workforce correspond to employment opportunities in the jurisdiction?**

Clackamas Community College offers degree and certificate programs in 3 locations including Wilsonville, Milwaukie and Oregon City as well as online. These training programs seem to be

addressing the needs of the workforce and employers. Degree and certificate programs include accounting, business, nursing, gerontology, construction trades, manufacturing, welding, electronic engineering, web design and welding.

Clackamas Community College website: <http://www.clackamas.edu/Catalog/>

**Describe any current workforce training initiatives, including those supported by Workforce Investment Boards, community colleges and other organizations. Describe how these efforts will support the jurisdiction's Consolidated Plan.**

Community Solutions for Clackamas County (CSCC) provides workforce development and business productivity services to the Clackamas County community. We serve employers, as well as people seeking employment. CSCC also oversees an innovative program that assists low-income homeowners and renters in weatherizing their homes. CSCC is a Division of the Health, Housing, and Human Services (H3S) Department. Services for Businesses are a range of services to assist large and small businesses in Clackamas County in need of great employees. Employment and Workforce Training programs are intended to increase the employability and wage potential of special populations. Learn more about our programs here, and see if you may qualify for employment assistance.

See Community Solutions Website: <http://www.clackamas.us/communitysolutions/>

The Consolidated Plan has employment training identified as a high need in public services. Employment training and support for persons with disabilities and for persons living in public housing is provided by Community Solutions. In FY CDBG funds in program year 2017, 2018 and 2019 will support Employment Connections, an employment training program.

**Does your jurisdiction participate in a Comprehensive Economic Development Strategy (CEDS)?**

No

**If so, what economic development initiatives are you undertaking that may be coordinated with the Consolidated Plan? If not, describe other local/regional plans or initiatives that impact economic growth.**

Not applicable to Clackamas County.

Economic Development activities were not identified as a high need during the community survey and community meetings process.

## **Discussion**

Since Economic Development activities were not identified as a high need during the community survey and community meetings process, no specific economic development activities will be funding during the 2017-2021 Consolidated Plan cycle.

## **MA-50 Needs and Market Analysis Discussion**

### **Are there areas where households with multiple housing problems are concentrated? (include a definition of "concentration")**

At this time the jurisdiction has no data on concentrations of households with multiple housing problems. The jurisdiction has identified several areas of concentrations of low-income and ethnicity however. A recent article in the Oregonian newspaper on March 13, 2017, identified one neighborhood along High 224 between Milwaukie and Happy Valley (census tract 0215 block group 001) as "severely rent burdened". The article stated that 57% of renters in this neighborhood were paying more than 50% of their incomes for housing costs.

### **Are there any areas in the jurisdiction where racial or ethnic minorities or low-income families are concentrated? (include a definition of "concentration")**

Clackamas County has 218 Census Tract Block Groups. Of those 218 block groups, ten percent (10%) have a population that is more than 56% low and moderate income. The 22 block groups (representing the 10% of all block groups in the county) with a population that is more than 56% low and moderate income households according to the Census Bureau.

Eight percent (7.7%) of Clackamas County residents identified their ethnicity (considered separate from race) as Hispanic or Latino in the 2010 census.

2010 Census data on ethnicity of County residents indicates that of the more populated cities, Canby and Molalla had the highest percentages of Hispanic/Latino residents (21% and 14% respectively). Among the cities with populations above 10,000 people, Canby, Happy Valley and Wilsonville had greater than 20% minority populations.

#### **Clackamas County Minority Concentration Definition:**

Clackamas County Housing and Community Development Division reviewed both race and ethnic information from the 2010 Census Bureau to determine minority ranking. The 22 block groups with the highest minority ranking represent 10 percent of all the block groups in Clackamas County.

A total of 37,379 persons were living in these high concentrations of minority areas.

Five (5) of the high concentration (HC) block groups are located in the North Clackamas Area. One (1) of the HC block groups is in Milwaukie and two (2) of the HC block groups is in Canby. A total of 13, 855 people live in these areas of concentrated minority and poverty.

### **What are the characteristics of the market in these areas/neighborhoods?**

The communities of North Clackamas and Milwaukie that include the areas of high concentrations are located in urbanized areas with mostly apartment units and rental houses. The City of Canby is a small town in a rural area that has a concentration in a larger census tract of mostly rental units in the north east corner of the city.

**Are there any community assets in these areas/neighborhoods?**

Each community that has a high concentration of ethnicity and low income persons has community assets including public transportation systems, good schools, services and employment opportunities. The one asset that does not seem to be abundant is affordable housing.

**Are there other strategic opportunities in any of these areas?**

Yes, each community that has a high concentration of ethnicity and low income persons has good schools, good transportation, employment options and access to services via public transportation. Persons in Canby when interviewed regarding fair housing stated that they had moved to Canby to secure employment, good schools for their children and safe housing for their families.

# Strategic Plan

## SP-05 Overview

### Strategic Plan Overview

The key points of this Strategic Plan:

1. There is a current housing affordability and availability crisis in the Portland metro area that includes Clackamas County.

#### 2. Strategic Plan Priorities

1. Affordable Housing
2. Homelessness
3. Non-housing Community Development

#### 3. Strategic Plan Goals

1. Affordable Housing
2. Housing Rehabilitation
3. Public Services
4. Homeless assistance
5. Public Facilities
6. Community Infrastructure

#### 4. Assessment of Fair Housing Goals in Priority Order:

1. Develop new housing units with long-term affordability for a broad range of low-income households with an emphasis on dispersal of affordable housing.
2. Increase accessibility to affordable housing for persons with disabilities and single parent familial status households. (households with children under 18 yrs.).
3. Improve access to housing and services for all protected classes.
4. Enforce Fair Housing laws and Increase public understanding of Fair Housing laws.
5. Coordinate Fair Housing Advocacy and Enforcement Efforts among regional partners
6. Ensure that all housing in Clackamas County is healthy and habitable.



## SP-10 Geographic Priorities – 91.215 (a)(1)

### Geographic Area

Table 47 - Geographic Priority Areas

<b>1</b>	<b>Area Name:</b>	Countywide
	<b>Area Type:</b>	Local Target area
	<b>Other Target Area Description:</b>	
	<b>HUD Approval Date:</b>	
	<b>% of Low/ Mod:</b>	
	<b>Revital Type:</b>	Comprehensive
	<b>Other Revital Description:</b>	
	<b>Identify the neighborhood boundaries for this target area.</b>	The target area is the entire county in both urban and rural areas.
	<b>Include specific housing and commercial characteristics of this target area.</b>	Clackamas County is considered an urban county by HUD.  Most of the population lives in urban areas. Housing in the county is mostly single family residential.  There are 15 incorporated cities within Clackamas County and a large un-incorporated urban area mostly in the northwest corner of the county.
	<b>How did your consultation and citizen participation process help you to identify this neighborhood as a target area?</b>	We selected the entire county because our consultation and citizen participation process did not identify any specific target areas within the county.
<b>Identify the needs in this target area.</b>	The community participation process resulted in affordable housing and homeless prevention as needs throughout the county.	
<b>What are the opportunities for improvement in this target area?</b>	We hope to direct more funding to affordable housing developments in high opportunity areas throughout the county.	

<p><b>Are there barriers to improvement in this target area?</b></p>	<p>The barriers are the same barriers to affordable housing: lack of available land, lack of funding and in some cases community opposition to affordable housing, special needs housing or multi-family housing projects.</p>
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**General Allocation Priorities**

Describe the basis for allocating investments geographically within the jurisdiction (or within the EMSA for HOPWA)

Clackamas County Housing and Community Development Division (HCD) does not target investment areas. HCD seeks to allocate funding throughout the county in both rural and urban areas.

There are areas identified as "high concentrations" of low-income and ethnicity however these areas are not targeted for investment by the Housing and Community Development Division.

The County also contains 3 Urban Renewal Areas that have been identified by the County's Development Agency. These Renewal Areas use property tax revenues to complete infrastructure projects..

## SP-25 Priority Needs - 91.215(a)(2)

### Priority Needs

Table 48 – Priority Needs Summary

1	<b>Priority Need Name</b>	Affordable Housing
	<b>Priority Level</b>	High
	<b>Population</b>	Extremely Low Low Families with Children Individuals Families with Children Mentally Ill Chronic Substance Abuse veterans Victims of Domestic Violence Persons with Mental Disabilities Persons with Physical Disabilities
	<b>Geographic Areas Affected</b>	Countywide
	<b>Associated Goals</b>	Public Services Housing Rehabilitation Affordable Housing
	<b>Description</b>	HOME funds and CDBG funds will be allocated during the 2017, 2018 ad 2019 program years for TBRA Rental Assistance, production of new multi-family housing units, Rehabilitation of existing units and Acquisition of existing affordable housing units if possible.
	<b>Basis for Relative Priority</b>	Through the community needs assessment process conducted in October and November of 2016, respondents consistently placed affordable housing as a top priority.
	2	<b>Priority Need Name</b>
<b>Priority Level</b>		High

	<b>Population</b>	Extremely Low Low Families with Children Chronic Homelessness Individuals Families with Children Mentally Ill Chronic Substance Abuse veterans Victims of Domestic Violence
	<b>Geographic Areas Affected</b>	Countywide
	<b>Associated Goals</b>	Homeless Assistance
	<b>Description</b>	The current housing crisis has caused homelessness to be recognised as a brutal problem effecting low-income persons particulrly families with children, veterans, victims of domestic violence and persons with mental illness and substance abuse issues.  ESG funds will be allocated for homeless shelters and rapid-rehousing programs in the 2017, 2018 and 2019 program years.
	<b>Basis for Relative Priority</b>	The Housing and Community Development Division has coordinated homeless housing efforts over the last 10 years through the Continuum of Care annual funding application process. The Continuum of Care annual funding level is now over \$2 million per year for services, reporting (HMIS) and rental assistance.
3	<b>Priority Need Name</b>	Non-housing Community Development
	<b>Priority Level</b>	High
	<b>Population</b>	Low
	<b>Geographic Areas Affected</b>	Countywide
	<b>Associated Goals</b>	Community Infrastructure Improvements Public Facilities Improvements Public Services

<p><b>Description</b></p>	<p>Public Facilities and Public Improvements were identified as high needs by cities during the community needs assessment process.</p> <p>Public facilities needed include: Homeless facilities, domestic violence services facilities, mental health services facilities, senior centers and abuse/neglected children facilities.</p> <p>Public Improvements needed include: water/sewer improvements, street/alley improvements, curbs and sidewalks, bike and pedestrian paths and street drainage improvements.</p>
<p><b>Basis for Relative Priority</b></p>	<p>Community Infrastructure Improvements, Public Facilities and Public Improvements were identified as high needs by cities during the community needs assessment process conducted in October and November of 2016.</p>

**Narrative (Optional)**

Clackamas County is a large and diverse county, covering 1,879 square miles with 15 incorporated cities and towns, as well numerous unincorporated communities. The more urbanized northern section of the county contrasts sharply with the rural and frontier nature of the southern and eastern portions of the county.

The Priority Needs that have been identified are not for allocating investment of available resources among different needs.

Public Facilities: These were identified as High Needs for Clackamas County: Homeless Facilities, Domestic Violence (services) Facilities, Mental Health Facilities, Senior Centers and Abused/Neglected Children Facilities.

Public Improvements: These were identified as High Public Improvements Needs for Clackamas County: Water/Sewer Improvements, Street/Alley Improvements, Curbs and Sidewalks, Bike and Pedestrian Paths and, Drainage (street) Improvements.

Public Services: Fair Housing Activities, Homeless Services, Youth Services, Neglected/Abused Children Services, Renter/foreclosure training and Employment/Training Services were identified as High Needs.

## SP-30 Influence of Market Conditions – 91.215 (b)

### Influence of Market Conditions

Affordable Housing Type	Market Characteristics that will influence the use of funds available for housing type
Tenant Based Rental Assistance (TBRA)	The current housing crisis in the Portland metropolitan area is affecting low and extremely low income households that are living in older rental units. These older rental units are being sold and or renovated to increase the rental income for investors and property owners. Low income families that are forced to move when a property is sold or renovated are having difficulty locating and affording a new rental unit. HOME funds will be allocated in the 2017, 2018 and 2019 program years for this activity.
TBRA for Non-Homeless Special Needs	Although the current housing crisis in the Portland metropolitan area is affecting low and extremely low income households that are at risk of homelessness, this type of program will not likely be funded between July 1, 2017 and June 30, 2021.
New Unit Production	The current housing crisis in the Portland metropolitan area is affecting low and extremely low income households that are trying to move to a more affordable home. Clackamas County has identified a gap of over 30,000 units of affordable housing needed for low-income residents in 2016. The private housing market has responded to the housing demand by increasing production of luxury homes and apartments that are not affordable for households with low-incomes.
Rehabilitation	Low income and disabled residents who own their homes may not be able to maintain the homes or afford to repair the homes to improve accessibility or energy efficiency. The Housing and Community Development Division administers a Housing Rehabilitation Program to assist over 35 households per year.
Acquisition, including preservation	The current housing crisis in the Portland metropolitan area is affecting low and extremely low income households that are living in older rental units and affordable housing projects. These older rental units are being sold and or renovated to increase the rental income for investors and property owners. Six properties with Section 8 assistance have been identified as potentially being lost to low income residents when the Section 8 contract expires sometime between July 1, 2017 and June 30 2022.

Table 49 – Influence of Market Conditions

## **SP-35 Anticipated Resources - 91.215(a)(4), 91.220(c)(1,2)**

### **Introduction**

Clackamas County Housing and Community Development Division works closely with the Housing Authority of Clackamas County, the County Behavioral Health Program, the Continuum of Care, non-profit agencies and the local County Social Service agencies to secure and administer many sources of funding for services, programs and rent assistance to benefit low-income residents of Clackamas County.

These expected resources are estimates based on historical funding trends, amounts to be matched and leveraged.

### **HOME Project-Related Soft Costs**

When HOME funds are allocated to an affordable housing project (as opposed to TBRA or CHDO operating), Clackamas County will have the option of charging reasonable and necessary staff and overhead support to the project as project-related soft costs. These may include:

- Processing of applications for HOME funds
- Appraisals required by HOME regulations
- Preparation of work write-ups, specifications, and cost estimates or review of these items if an owner has had them independently prepared
- Project underwriting
- Construction inspections and oversight
- Project documentation preparation
- Costs associated with a project-specific environmental review
- Relocation and associated costs
- Costs to provide information services such as affirmative marketing and fair housing information to prospective tenants
- Staff and overhead costs related any of the above actions

**Anticipated Resources**

Program	Source of Funds	Uses of Funds	Expected Amount Available Year 1				Expected Amount Available Reminder of ConPlan \$	Narrative Description
			Annual Allocation: \$	Program Income: \$	Prior Year Resources: \$	Total: \$		
CDBG	public - federal	Acquisition Admin and Planning Economic Development Housing Public Improvements Public Services	1,817,859	100,000	0	1,917,859	6,406,826	The FY 2017 program year is the beginning of the 5-year Consolidated Plan. The expected amount available is based on the assumption that funds will be cut by 5% each year.
HOME	public - federal	Acquisition Homebuyer assistance Homeowner rehab Multifamily rental new construction Multifamily rental rehab New construction for ownership TBRA	712,517	200,000	0	912,517	2,511,178	The FY 2017 program year is the beginning of the 5-year Consolidated Plan. The expected amount available is based on the assumption that funds will be cut by 5% each year



Program	Source of Funds	Uses of Funds	Expected Amount Available Year 1				Expected Amount Available Reminder of ConPlan \$	Narrative Description
			Annual Allocation: \$	Program Income: \$	Prior Year Resources: \$	Total: \$		
ESG	public - federal	Conversion and rehab for transitional housing Financial Assistance Overnight shelter Rapid re-housing (rental assistance) Rental Assistance Services Transitional housing	170,959	0	0	170,959	602,526	The FY 2017 program year is the beginning of the 5-year Consolidated Plan. The expected amount available is based on the assumption that funds will be cut by 5% each year

Table 50 - Anticipated Resources

**Explain how federal funds will leverage those additional resources (private, state and local funds), including a description of how matching requirements will be satisfied**

Resources reasonably expected to be made available to supplement CDBG funds include local matching to be contributed by project sponsors. Matching contributions (cash or in-kind) equivalent in value to a minimum of 20% of the project cost are required by County policies. It is anticipated that funding available to finance community development activities from local matching sources and will total at least \$xxx,xxx. CDBG anticipates approximately \$100,000 of program income per year from the Housing Rehabilitation program loan repayments and \$25,000 of prior year funds will support annual projects.

The Continuum of Care application process will renew at least \$1,700,000 of funding annually for homeless services, programs and rent assistance for homeless individuals and families. In 2016 CoC was eligible to apply for an additional \$251,421 of funds as a bonus project. In 2016 HUD awarded the Clackamas Continuum a total of \$2,087,390 which includes additional funding due to increased Fair Market Rent (FMR) rates and additional funds for the Housing Our Heros homeless veterans and families housing assistance program.

### **HOME Program Income**

HOME Program Income (PI) is generated from the repayment of HOME loans that the county has made to affordable housing projects. As provided for in the 2016 HOME Interim Rule, Clackamas County will retain HOME PI that is received during the program year, and allocate it to a specific project or projects in the subsequent program year. For the program year ending June 30, 2017, the county anticipates that it will retain approximately \$42,000 of HOME PI, and will allocate the PI to a HOME multi-family housing project in the upcoming program year.

ESG funds will be matched using private donations, local and state homeless prevention funds.

### **If appropriate, describe publically owned land or property located within the jurisdiction that may be used to address the needs identified in the plan**

No publically owned land is available for this purpose.

### **Discussion**

The Housing and Community Development Division will continue to partner with the Housing Authority of Clackamas County, the County Behavioral Health Program, the County Health Centers, the Continuum of Care, non-profit agencies, for profit housing developers and the local County Social Service agencies to explore new programs, services and financial resources for programs and services that benefit our low-income and special needs residents.

Anticipated Resources amounts are based on anticipated funding levels, anticipated program income, prior year funds carried forward and expected matching funds on individual community projects.

**HOME Program Income**

HOME Program Income (PI) is generated from the repayment of HOME loans that the county has made to affordable housing projects. As provided for in the 2016 HOME Interim Rule, Clackamas County will retain HOME PI that is received during the program year, and allocate it to a specific project or projects in the subsequent program year. For the program year ending June 30, 2017, the county anticipates that it will retain approximately \$42,000 of HOME PI, and will allocate the PI to a HOME multi-family housing project in the upcoming program year.

## SP-40 Institutional Delivery Structure – 91.215(k)

Explain the institutional structure through which the jurisdiction will carry out its consolidated plan including private industry, non-profit organizations, and public institutions.

Responsible Entity	Responsible Entity Type	Role	Geographic Area Served
CLACKAMAS COUNTY	Government	Homelessness Non-homeless special needs Ownership Planning Rental neighborhood improvements public facilities public services	Jurisdiction
Housing Authority of Clackamas County	PHA	Homelessness Ownership Planning Public Housing Rental	Jurisdiction
NORTHWEST HOUSING ALTERNATIVES	Non-profit organizations	Homelessness Rental public facilities public services	Jurisdiction
CLACKAMAS WOMEN'S SERVICES	Non-profit organizations	Homelessness Rental public facilities public services	Jurisdiction
Cascade AIDS Project	Non-profit organizations	Non-homeless special needs	Region
INN HOME	Non-profit organizations	Homelessness Non-homeless special needs public facilities	Jurisdiction

**Table 51 - Institutional Delivery Structure  
Assess of Strengths and Gaps in the Institutional Delivery System**

Clackamas County has a Department of Health, Housing and Human Services (H3S) that is the primary institutional delivery system for services for low-income persons and families, homeless persons and persons with disabilities. H3S provides and contracts with providers to offer a number

services including: energy assistance, veteran outreach, aging and disability services, community primary care and dental care clinics, homeless housing, public housing, behavioral health services, tenant rights training, employment training, behavioral health crisis walk-in clinic, alcohol and drug addictions counseling, homeless Continuum of Care funding and services coordination, rental assistance programs and program planning services.

**Availability of services targeted to homeless persons and persons with HIV and mainstream services**

Homelessness Prevention Services	Available in the Community	Targeted to Homeless	Targeted to People with HIV
<b>Homelessness Prevention Services</b>			
Counseling/Advocacy	X		
Legal Assistance	X		
Mortgage Assistance			
Rental Assistance	X		
Utilities Assistance	X		
<b>Street Outreach Services</b>			
Law Enforcement	X		
Mobile Clinics	X	X	
Other Street Outreach Services	X		
<b>Supportive Services</b>			
Alcohol & Drug Abuse	X		
Child Care	X		
Education	X	X	
Employment and Employment Training	X	X	
Healthcare	X		
HIV/AIDS			
Life Skills	X	X	
Mental Health Counseling	X	X	
Transportation	X		
<b>Other</b>			

**Table 52 - Homeless Prevention Services Summary**

**Describe how the service delivery system including, but not limited to, the services listed above meet the needs of homeless persons (particularly chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth)**

Persons with HIV/AIDS are referred to the Cascade Aids Project as the provider of HIV/AIDS specific services in the region. Services targeted to homeless person are provided through the Continuum of Care providers including the Housing Authority of Clackamas County, Social Services Division and non-

profit providers including 2 providers of services to survivors of domestic violence, one provider of services to homeless youth, public school homeless youth liaisons. The Social Services Division also coordinates homeless services with several faith based agencies that provide meals, seasonal warming shelters and emergency shelter for homeless families. The Homeless Continuum of Care has designed and implemented a coordinated Housing Access system to better track the number of persons requesting homeless assistance as well as which persons were able to receive services.

**Describe the strengths and gaps of the service delivery system for special needs population and persons experiencing homelessness, including, but not limited to, the services listed above**

The strength of the H3S service delivery system is that the county can coordinate many services to make the best use of any available funding to provide services. Since the county is the major provider there is very little un-necessary competition for limited federal and state resources. There are also few non-profit organizations that are capable of providing those services without a partnership with the county. The Continuum of Care has been able to effectively re-allocate funds to provide more rapid re-housing services and veteran housing program to respond to annual renewal application requirements. New Continuum of Care projects and funding have been awarded to provide rental assistance for homeless veterans and their families.

The gaps in services continues to be a lack of transitional and permanent supportive housing facilities to house homeless persons and their families. The lack of facilities is due to several factors including community resistance to facilities, lack of funding to build and operate facilities and lack of ongoing financial support of facilities and services for low-income, disabled and homeless persons. The current housing crisis has increased rents thereby reducing the number of persons that can be housed with the same levels of funding.

**Provide a summary of the strategy for overcoming gaps in the institutional structure and service delivery system for carrying out a strategy to address priority needs**

One strategy is to develop a county Strategic Housing Plan to direct limited resources to the most effective housing solutions for homeless persons, their families and affordable housing funding options.

## SP-45 Goals Summary – 91.215(a)(4)

### Goals Summary Information

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
1	Affordable Housing	2017	2021	Affordable Housing	Countywide	Affordable Housing	CDBG: \$0 HOME: \$2,500,000 ESG: \$0	Rental units constructed: 300 Household Housing Unit  Rental units rehabilitated: 100 Household Housing Unit  Direct Financial Assistance to Homebuyers: 25 Households Assisted  Tenant-based rental assistance / Rapid Rehousing: 100 Households Assisted
2	Housing Rehabilitation	2017	2021	Affordable Housing	Countywide	Affordable Housing	CDBG: \$1,500,000 HOME: \$0 ESG: \$0	Rental units rehabilitated: 30 Household Housing Unit  Homeowner Housing Rehabilitated: 120 Household Housing Unit
3	Public Services	2017	2021	Non-Homeless Special Needs	Countywide	Affordable Housing Non-housing Community Development	CDBG: \$1,000,000 HOME: \$0 ESG: \$0	Public service activities other than Low/Moderate Income Housing Benefit: 10000 Persons Assisted

Sort Order	Goal Name	Start Year	End Year	Category	Geographic Area	Needs Addressed	Funding	Goal Outcome Indicator
4	Homeless Assistance	2017	2021	Homeless	Countywide	Homelessness	CDBG: \$0 HOME: \$0 ESG: \$750,000	Tenant-based rental assistance / Rapid Rehousing: 150 Households Assisted  Homeless Person Overnight Shelter: 4000 Persons Assisted
5	Public Facilities Improvements	2017	2021	Non-Housing Community Development	Countywide	Non-housing Community Development	CDBG: \$2,000,000 HOME: \$0 ESG: \$0	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit: 7500 Persons Assisted
6	Community Infrastructure Improvements	2017	2021	Non-Housing Community Development	Countywide	Non-housing Community Development	CDBG: \$3,000,000 HOME: \$0 ESG: \$0	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit: 10000 Persons Assisted

Table 53 – Goals Summary

## Goal Descriptions



1	<b>Goal Name</b>	Affordable Housing
	<b>Goal Description</b>	<p>HOME funds will assist in the development of new affordable housing units, preservation of existing affordable housing and Tenant Base Rental Assistance. HOME funds allocated to Clackamas County have been reduced each year due to federal budget cuts. These goal estimates are based on the assumption that HOME funds will not be reduced any further.</p> <p>An estimated 300 new units (60 per year) of affordable housing will be assisted with HOME funds between July 1, 2017 and June 30, 2022.</p> <p>An estimated 100 units of affordable housing (20 per year) will be preserved with HOME funds between July 1, 2017 and June 30, 2022.</p> <p>An estimated 100 households (20 per year) will be assisted with Tenannt Base Rental Assistance HOME funds between July 1, 2017 and June 30, 2022.</p> <p>An estimate 25 households (5 per year) will recieve down payment assistance to purchase homes.</p>
2	<b>Goal Name</b>	Housing Rehabilitation
	<b>Goal Description</b>	<p>New affordable housing and maintaining affordable housing were both identified as high priorities during th ecommunity needs assessment process in September and october of 2016.</p> <p>The Housing Rehabilitation Program assists low-income homeowners and low-income renters with grants and low cost loans to improve accessiblity to their homes, reduce energy consumption and maintain long term affordability of their homes.</p> <p>An estimated 150 households (30 per year) will benefit from housing rehabilitation services between July 1, 2017 and June 30, 2022.</p>

3	<b>Goal Name</b>	Public Services
	<b>Goal Description</b>	<p>A community survey of cities and the general public was conducted in September and October of 2016. Public Services Needs were identified through community surveys, public housing resident surveys and public meetings with community groups. Fair Housing Activities, Homeless Services, Youth Services, Neglected/Abused Children Services, Renter/foreclosure training and Employment/Training Services were identified as High Needs.</p> <p>An estimated 10,000 persons (2,000 per year) will benefit from public services between July 1, 2017 and June 30, 2022.</p>
4	<b>Goal Name</b>	Homeless Assistance
	<b>Goal Description</b>	<p>Homeless assistance is provided through Emergency Solutions Grants and Continuum of Care funding and services. The estimated goals are based on the assumption that annual funding will remain at current year levels.</p> <p>An estimated 1750 homeless low income households (350 households/875 persons per year) will be assisted with emergency shelter, transitional housing or rapid re-housing to stabilize their households to secure additional resources, permanent housing or permanent supportive housing between July 1, 2017 and June 30, 2022.</p>
5	<b>Goal Name</b>	Public Facilities Improvements
	<b>Goal Description</b>	<p>A community survey of cities and the general public was conducted in September and October of 2016. Public Facilities Needs were identified through community surveys, public housing resident surveys, and public meetings with community groups. These were identified as High Needs for Clackamas County: Homeless Facilities, Domestic Violence (services) Facilities, Mental Health Facilities, Senior Centers and Abused/Neglected Children Facilities.</p> <p>An estimated 7500 persons (1500 per year) will benefit from public facilities improvements between July 1, 2017 to June 30, 2022 (5 program years).</p>

6	<b>Goal Name</b>	Community Infrastructure Improvements
	<b>Goal Description</b>	<p>A community survey of cities and the general public was conducted in September and October of 2016. Public Improvement Needs were identified through community surveys, public housing resident surveys, surveys of city planning staff and public meetings with community groups.</p> <p>These were identified as High Public Improvements Needs for Clackamas County: Water/Sewer Improvements, Street/Alley Improvements, Curbs and Sidewalks, Bike and Pedestrian Paths and, Drainage (street) Improvements.</p> <p>An estimated 10000 persons (2000 per year) will benefit from public facilities improvements between July 1, 2017 to June 30, 2022 (5 program years).</p>

**Estimate the number of extremely low-income, low-income, and moderate-income families to whom the jurisdiction will provide affordable housing as defined by HOME 91.315(b)(2)**

HOME funds will assist in the development of new affordable housing units, preservation of existing affordable housing and Tenant Base Rental Assistance. HOME funds allocated to Clackamas County have been reduced each year due to federal budget cuts. These goal estimates are based on the assumption that HOME funds will not be reduced any further.

525 households will be provided with affordable housing between July 1, 2017 and June 30, 2022. See Affordable Housing Goal.

## **SP-50 Public Housing Accessibility and Involvement – 91.215(c)**

### **Need to Increase the Number of Accessible Units (if Required by a Section 504 Voluntary Compliance Agreement)**

There is no need to increase the number of accessible units at the Housing Authority of Clackamas County public housing units. There is no Section 504 Voluntary Compliance Agreement.

### **Activities to Increase Resident Involvements**

HACC encourages Public Housing residents to engage in management through a Resident Advisory Board (RAB). RAB membership is comprised of public housing and Section 8 Housing Choice Voucher (HCV) leaders that represent residents served by HACC. The RAB convenes not fewer than two times per year to develop, approve, review and evaluate HACC's Annual Plan. The RAB is also consulted for input and approval of any significant amendment or modification to the Annual Plan. A member of the RAB has a permanent seat on the County's Housing Advisory Board.

### **Is the public housing agency designated as troubled under 24 CFR part 902?**

No

### **Plan to remove the 'troubled' designation**

Not Applicable to Clackamas County.

## **SP-55 Barriers to affordable housing – 91.215(h)**

### **Barriers to Affordable Housing**

The majority of resident feedback during Assessment of Fair Housing community meetings was that most people liked where they lived, however, many people including persons with disabilities felt that it was very difficult to find another affordable unit should they want to move. Current state law provides a mechanism to ensure that a certain percentage of new development is reserved for low-income tenants (known as “inclusionary housing” or “inclusionary zoning”). Clackamas will be evaluating the feasibility and the various options for implementing inclusionary zoning within the county.

The Low Income Housing Tax Credit (LIHTC) market has come to a screeching halt due to potential tax policy changes at the federal level. Clackamas County relies on the State of Oregon LIHTC Program which recently provided this guidance to all proposed affordable housing projects: State of Oregon OHCS decision....letter dated 2/10/2017...

“anticipated federal corporate tax reform has negatively impacted the LIHTC equity market creating real-time consequences for the 33 multifamily affordable housing projects in the OHCS "pipeline". These projects have received funding reservations based on tax credit pricing that is no longer available. Among projects facing probable gaps are a large number of 4% LIHTC projects, as well as the 9% LIHTC projects that the Housing Stability Council approved in November 2016.”

“Do not issue a 2017 LIHTC and HOME NOFA and instead fund additional 2016 applications, reserving some credits for gaps in 9% LIHTC pipeline projects and use flexible gap funding resources to help fill funding gaps on as many pipeline projects as possible”

Zoning Issues: Multi-family housing developments are typically restricted to areas that are zoned as high or medium density residential in each community and throughout the jurisdiction. Communities have many requirements for multifamily housing including: amenities such as onsite parking, fire access, buildings that “match” the character of the neighborhood and traffic impact studies, etc. All these requirements of multifamily housing projects increase the initial cost and result in affordable housing that is expensive to build and maintain. The State of Oregon has a land use plan (Goal 10) that requires all communities to allocate land for multifamily developments however some communities are more compliant than others. State and regional housing advocates are beginning to challenge communities to meet the Goal 10 requirements to provide land for multi-family housing developments. In 2015 Housing Land Advocates joined the Coalition for Affordable and Safe Housing to repeal Oregon’s ban on inclusionary zoning, and allow Oregon communities access to this important tool for creating affordable housing in areas of opportunity. The ban was lifted in 2016 with the passage of HB1533 which became effective June 2, 2016.

## **Strategy to Remove or Ameliorate the Barriers to Affordable Housing**

Clackamas County has formed a Housing Advisory Board to provide affordable housing policy guidance to the Housing Authority and the Board of County Commissioners. The Housing Advisory Board (HAB) is an eight member body that convenes once each month to discuss topics and issues pertaining to the development, preservation and promotion of affordable housing of all types in Clackamas County. Currently, the HAB has been working on developing an Affordable Housing Toolkit that may help mitigate some of the impediments to affordable housing development. The toolkit will describe available policies and resources that the county may utilize to address the growing need for affordable housing in the County. Tools that promote both new development and preservation of affordable housing are being considered.

## **SP-60 Homelessness Strategy – 91.215(d)**

### **Reaching out to homeless persons (especially unsheltered persons) and assessing their individual needs**

**Households with dependent children:** Locally funded HomeBase (RRH and homelessness prevention) expanded last year, reaching 459 people & plans to increase capacity next year. The locally funded Bridges to Housing Program stabilizes housing for high need homeless families serving 38 families & 63 children last year. Through the Rent Well-RRH project 25 families from the streets/emergency shelter will be assisted. Clackamas Womens Services and a network of churches and faith-based organizations in North Clackamas are working to address family homelessness in their community.

**Survivors/Victims of domestic violence:** The CoC includes a TH and a PSH project focused on domestic violence survivors and their families. This provider operates an ESG funded DV emergency shelter which recently doubled its beds, a homelessness prevention program, Beyond Shelter, and the newly opened Family Justice Center. The projects involve a wide range of on-site services from over 12 public safety and services agencies, funded by more than 24 public and private entities. Victims in Clackamas County can now access an advocate, plan for their safety, talk to a police officer, meet with a prosecutor, receive medical assistance, file a protective order in a video court, receive information on shelter and get help with transportation—all in one location on a drop-in basis.

**Unaccompanied youth:** Springwater is a CoC TH for youth 16- 21 funded with CoC, ESG, local government & private funds. HomeSafe is a CoC TH for pregnant and parenting youth 6 – 21 funded with CoC, local and state grants. Host Homes is funded with local, state and private grants. The program is for 16- 18 year olds attending school houses up to six unaccompanied youth with families. The Outside In program funded with local government grants links with school Homeless Liaisons to provide health services to unaccompanied youth 16-17 in the school & community.

### **Persons who routinely sleep on the streets or in other places not meant for human habitation:**

Clackamas County has a range of services for persons sleeping on the streets or in other places not meant for human habitation. Two major service centers (Clackamas Services Center and Father’s Heart) provide hot meals, clothing, medical services, and severe weather shelter, and are close to where many unsheltered homeless reside. Several smaller agencies also provide basic needs and outreach to homeless on the streets and places not meant for habitation.

Compassion events, similar to Project Homeless Connect, are held throughout the year to provide a “one stop” for basic services, such as food, clothing, medical care, veterans’ services and housing options. A new severe weather winter shelter opened in 2013 in a rural area with a significant homeless camping population.

**Homelessness among veterans:** Housing Authority of Clackamas County has housed 25 homeless veterans using VASH vouchers. The Veterans Services Office conducts veteran outreach with free medical screenings, warm clothing, information on compensation and other veterans’ benefits,

employment, housing, counseling and other services. Clackamas County is part of a new SSVF grant and is providing office space and supplemental rental assistance using state funds for a nonprofit provider of outreach, homeless placement and homeless prevention for veterans. This grant has streamlined access to the regional Grant Per Diem program for vets who are working on permanent housing placement either through VASH, SSVF or other programs.

### **Addressing the emergency and transitional housing needs of homeless persons**

The activities to address emergency shelter needs within the County will be funded through the Emergency Solutions Grants (ESG) program. Primary emphasis will continue to be on payment of emergency shelter operations expenses including utilities, maintenance, insurance, and staff salary costs. The purpose of emphasizing payment of operations expenses is to provide some predictability and stability to the operation of the shelters by assuring that their most basic expenses are met. This assures the continued operation of the facilities in times of scarce and fluctuating resources, and it compliments specific fundraising efforts for special projects.

Northwest Housing Alternatives' Annie Ross House and Clackamas Women's Services' Evergreen House, provide emergency shelter to homeless families with children and survivors of domestic violence, respectively. Independent living services are provided through The Inn's Springwater program, which targets assistance to the homeless youth population. Los Ninos Cuenten's Casa Hogar provides emergency shelter services to Hispanic/Latino homeless families and individuals who have survived domestic violence. Case management at each program improves vocational and coping skills to make the transition from homelessness to independent living. Continuum of Care funds Also provide 49 beds of transitional housing for homeless households, including families, singles, and youth.

Clackamas County's Coordinated Housing Access system provides a one-stop option for homeless individuals and families to be assessed and matched with all homeless programs in the County for which they are eligible.

**Helping homeless persons (especially chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth) make the transition to permanent housing and independent living, including shortening the period of time that individuals and families experience homelessness, facilitating access for homeless individuals and families to affordable housing units, and preventing individuals and families who were recently homeless from becoming homeless again.**

Chronically homeless individuals and families: The Continuum of Care increased the number of beds for chronically homeless persons in Clackamas County in 2014 by leveraging Housing Authority Housing



Choice Vouchers, converting Permanent Supportive Housing (PSH) beds to chronically homeless beds, reaching out to PSH providers to prioritize beds for chronically homeless persons and using Medicaid to provide enhanced services for chronically homeless persons in PSH beds.

Families with children: The CoC increased capacity and worked on outreach goals to end homelessness among households with dependent children. The HomeBase program utilized multiple funding sources to expand and become the largest RRH and homelessness prevention program in the County. Through the reallocated Rent Well RRH project, the CoC will be able to stabilize housing for 15 families from the streets/emergency shelter. The locally-funded Bridges to Housing (B2H) Program stabilizes housing for high-need homeless families and assisted 136 persons last year. Outreach plan includes referrals from different geographic parts of the county. An outreach strategy adopted by the HPC educates landlords on housing choice vouchers.

B2H serves high-needs homeless families with children, with a capacity of 30 families at a time. These homeless families have multiple complex needs which often include but are not limited to housing barriers, domestic violence, addictions, mental health issues and disabling conditions. B2H families receive longer term housing subsidies and intensive services designed to support their income self-sufficiency and permanent housing stability as well as the children's and adult's educational success.

Veterans and their families: Housing Authority of Clackamas County has housed 45 homeless veterans using VASH vouchers. The Veterans Services Office coordinates with Social Services to conduct veteran outreach with free medical screenings, warm clothing, information on compensation and other veterans' benefits, employment, housing, counseling and other services. Clackamas County is part of an SSVF grant and provides office space for a nonprofit provider of outreach, homeless placement and homeless prevention for veteran families. This grant has streamlined access to the regional Grant Per Diem program for vets who are working on permanent housing placement either through VASH, SSVF or other programs.

Unaccompanied youth: Springwater Transitional Housing for youth 18-23 is funded with CoC, ESG, local government, and private funds. Case management, vocational education services, physical and mental health support, supervision and shelter are provided to youth.

HomeSafe Transitional Housing for pregnant and parenting youth 16 – 21 is funded with CoC, local and state grants. Youth have access to rent assistance in scattered apts., case management, referral and linkages to mainstream services.

Independent Living Plans (ILPs) are funded with state and local govt. funds for independent living services to youth transitioning from foster care. Case management is provided for youth discharged from Child Welfare at 18 or 19 years old without permanent housing. Case managers refer and link ex-foster youth to programs and services.

**Help low-income individuals and families avoid becoming homeless, especially extremely low-income individuals and families who are likely to become homeless after being discharged from a publicly funded institution or system of care, or who are receiving assistance from public and private agencies that address housing, health, social services, employment, education or youth needs**

These discharge plans have been confirmed through the Continuum of Care application and planning process.

Foster Care: The Oregon Department of Human Services (DHS), dictates the Foster Care Discharge Policy in which the County actively participates. DHS refers willing children to a Continuum of Care provider for a Life Skills/Transition Readiness Assessment. This results in: 1. Identification of resources and linkages needed to assist the child in transitioning to independent living, including life skills training, housing subsidies, college tuition, and health insurance and 2. Preparation of an individualized Comprehensive Transition Plan which must be approved by a Family Court Judge every 6 months until the child is successfully transitioned to independent living.

Youth can access Chafee rental subsidies to help them secure an apartment. They can secure tuition-free access to a state college along with Chafee grants to assist with room and board. Youth with developmental disabilities and/or mental illness exiting the foster care system continue to receive an array of services including options such as adult foster care and supported housing that are based on unique client needs. Each option is designed to ensure that youth exiting the foster care system are not routinely discharged into homelessness.

Health Care: The discharge planning for low-income and disabled people has historically resided with the State through the Medicaid program. With the advent of the Affordable Care Act (ACA) and the expansion of Oregon's Medicaid program, discharge planning is shifting to local control. All Medicaid providers are joined in Coordinated Care Organizations (CCOs) covering specific geographic areas. The CCOs integrate physical, mental and dental health services. The ACA Medicaid expansion has been structured to align the financial incentives with clinical outcomes/housing status of patients. This has begun to persuade hospital systems and health care providers to plan and act outside their silo, to begin discussions with CoCs about effective liaison and resource sharing.

Mental Health: The Discharge Policy in place for persons being discharged from a mental health facility is ensured by Clackamas County Behavioral Health Department (CCBH). As part of Health Share, the area's Medicaid Coordinated Care Organization, CCBH has both financial and clinical incentives to ensure that no county residents are discharged from a psychiatric hospital without housing and services. In addition, Oregon is under an U. S. Dept. of Justice 4 year plan to provide better community outcomes for people with mental illness. Specific mandates are subcontracted by the State to CCBH. The local Discharge Policy, which is monitored and enforced by the State, requires all adults leaving a psychiatric hospital be housed consistent with their level of care needs and personal wishes.

Corrections: The purposeful effort to structure successful community re-entry for inmates is a local mandate spearheaded by the Clackamas County Sheriff's Office (CCSO) which participates on the CoC governing board. Because community safety is its #1 priority, CCSO promotes post-discharge services with housing to reduce recidivism. Likewise, the Clackamas County Behavioral Health (CCBH) is a provider in the local Medicaid program, Health Share. CCBH understands that successful re-entry will reduce incidence and cost of ER visits and hospitalization.

## **SP-65 Lead based paint Hazards – 91.215(i)**

### **Actions to address LBP hazards and increase access to housing without LBP hazards**

These actions are coordinated through the Housing Rehabilitation Program.

Clackamas County contracts with a professional firm to provide lead hazard evaluation services at no cost to the owners and buyers participating in its housing rehabilitation and homebuyer programs. When such hazards are discovered, they are addressed in a manner consistent with procedures approved by HUD, the State Health Division and the Department of Environmental Quality. However, the County does not anticipate using HOME funds for its housing rehabilitation and homebuyer programs in the next year. The HOME-funded project will be new construction and will not involve lead-paint hazards.

### **How are the actions listed above related to the extent of lead poisoning and hazards?**

The extent of the lead poisoning and hazards will not have any affect on the plan of action. The county's Housing Rehabilitation program will continue to test homes that are identified as having a high probability of containing lead hazards. The Housing Rehabilitation Program is more likely to provide services to older homes than newer homes with no lead hazards.

### **How are the actions listed above integrated into housing policies and procedures?**

The actions listed above are included in the Housing Rehabilitation program manual. The Housing Authority of Clackamas County also has a lead-based paint policy which is part of all public housing Housing Quality Standards (HQS) inspections and Section Choice Voucher program rental unit inspections.

The Housing Rehabilitation Program has an internal *lead-based paint hazards specialist* that participates in a number of activities aimed at educating the public and addressing lead based paint hazards. Activities of the lead paint hazard reduction specialist may include:

- Participating in the Oregon Childhood Lead Poisoning Elimination Plan.
- Promoting “Lead Safe Work Practices” training for contractors.
- Educating homeowners in lead-based paint hazards.
- Offering lead hazard evaluations of properties for applicants of the Clackamas County Housing Rehabilitation Program.
- Offering lead hazard reduction through our partnership with the regional Portland Lead Hazard Control Program Grant.
- Offering blood lead testing through the Portland Lead Hazard Control Program.



## **SP-70 Anti-Poverty Strategy – 91.215(j)**

### **Jurisdiction Goals, Programs and Policies for reducing the number of Poverty-Level Families**

The Housing and Community Development Division (HCD) coordinates efforts with the Social Services Division (SSD) to reduce the number of households below the poverty line. SSDs activities include:

- Participation in and staffing of the Continuum of Care in Clackamas County as well as the Continuum of Care Steering Committee (Governing Board) and the Homeless Policy Council.
  
- Coordination and maintenance of liaison relationships with McKinney Vento funded homeless liaisons that support the educational success of homeless children. These include each of the School Districts in the county, all Clackamas Educational Service District offices, and the State of Oregon Department of Higher Education.
  
- Contracting with a community based organization for a Homeless Student Success Project that enhances the capacity of the homeless liaison at the highest poverty school district in Clackamas County.
  
- Participation as one of the four lead agencies on the regional steering committee for the Rent Well tenant education program.
  
- Participation in the operations of the Janssen Transitional Housing Project (JTHP). SSD currently provides case management for the families living at Janssen. This HUD funded project, sponsored by the Housing Authority of Clackamas County, has been in operation for more than 20 years. JTHP provides seven (7) transitional housing units, intensive and comprehensive case management, flexible assistance to support residents increasing their income and housing stability, and other supportive services for homeless families with children.
  
- Maintain the Housing Rights and Resources Program which responds to the general public regarding emergency housing, housing discrimination, landlord-tenant concerns, low-cost housing, rent assistance and a variety of other housing-related issues.
  
- Maintain a contractual relationship with Legal Aid Services of Oregon and the Fair Housing Council of Oregon to support the delivery of Fair Housing services to Clackamas County residents. This contractual relationship hastens service delivery for people experiencing potential discrimination and/or fair housing violations.

### **How are the Jurisdiction poverty reducing goals, programs, and policies coordinated with this affordable housing plan**

Clackamas County Housing and Community Development Division (HCD) works in conjunction with the Housing Authority of Clackamas County, the Social Services Division, the Behavioral Health Division, Community Health Centers and community non-profit housing providers and private non-profit social services providers to address obstacles to meeting underserved needs, foster and maintain affordable housing, develop institutional structure, encourage public housing residents to become more involved in management and encourage public housing residents to attain home ownership.

In 2017 through 2019 HCD plans to fund several affordable housing projects, an employment training program, a fair housing rights and information program, homeless prevention and rapid rehousing services, and a youth mentoring program for youth in public housing.

The overall number of people living below the poverty line is slightly higher in 2016 than it was in the 2010 census, as is the number of people aged 60 and older living in poverty, which has increased from 4,139 to 5,603. This means that 6.6 percent of the people 60 and older in Clackamas County live below the poverty level.

The number of people with a disability has declined since the last Area Plan in all age groups except for those aged 65 and older, which increased from 18,717 to 19,692.

## **SP-80 Monitoring – 91.230**

**Describe the standards and procedures that the jurisdiction will use to monitor activities carried out in furtherance of the plan and will use to ensure long-term compliance with requirements of the programs involved, including minority business outreach and the comprehensive planning requirements**

ADD MORE HERE.

Staff conduct many activities including: project qualification, environmental reviews, public bidding, writing subrecipient agreements, contract monitoring, inspections, and reporting.

*The monitoring plan must describe:*

- *The standards and procedures that the jurisdiction will use to monitor activities carried out in furtherance of the plan, incorporating the HOME program emphasis if applicable.*
- *What defined efforts the jurisdiction will utilize to ensure long-term compliance with requirements of the programs. This includes minority business outreach and the comprehensive planning requirements.*



## Attachments

## Citizen Participation Comments

### Clackamas County Community Development Public Meeting Summary

6:00p.m. Wednesday, October 26, 2016  
150 Beaver creek Road, Rm 118  
Oregon City, Oregon

#### In Attendance:

Brianna Williamson, Clackamas County Social Services Division  
Erika Silver, Clackamas County Social Services Division  
Emily Reiman, NEDCO (Neighborhood Economic Development Corporation)  
Amy Hamilton, NEDCO (Neighborhood Economic Development Corporation)  
Shelly Mead, Bridges to Change  
Martha McLennan, Northwest Housing Alternatives (NHA)  
Kevin Ko, Housing and Community Development (HCD) Manager  
Mark Sirois, Project Coordinator, Community Development Program

Kevin Ko, Community Development Division, opened the meeting at 6:00p.m. by thanking everyone for attending. Kevin explained that the public meeting was a chance for community members to learn about the Community Development Program and the funding that HUD provides. The meeting also provides an opportunity to get information from citizens on the specific community needs and discuss any proposal ideas for housing and community development projects in the County.

Mark Sirois continued by discussing the anticipated federal funding levels of approximately \$1.2 million dollars for projects in each coming year. Mark explained that this next 3-year funding cycle will be using an online application system. Mark handed out a Helpful Hints document and a ZoomGrants document to provide guidance on completing a CDBG or ESG project application using the online application. The application process will open on November 9 and close on December 21, 2016 for projects beginning July 1, 2017. Applicants should be awarded funds sometime in late February or early March 2017 after review and approval by the CDBG Program Policy Advisory Board. HCD will get notification from HUD in April about the actual allocations from HUD.

Mark opened the floor for people to introduce themselves and discuss the needs they see in the community and their particular project ideas.

#### Public Comments:

Brianna Williamson provided a description of the Housing Rights and Resources program that is funded by CDBG. Brianna stated that the program helps residents avoid being evicted. Last year the program process over 2500 called from people seeking help with housing problems. The program is unique in that program staff help people describe the specifics of their particular housing issues as well as properly screen persons before referring them to legal Aid Services of Oregon if needed. The Housing Rights and

Resources program also helps landlords get accurate information regarding their rights as landlords in addressing any concerns about difficult tenants.

Erika Silver added that this service is much needed in Clackamas County to prevent people from becoming homeless and to help the County maintain good relationships with landlords.

Martha McLennan, executive director of NHA, thanked Clackamas County for supporting the Annie Ross House and the HomeBase housing stabilization and homeless prevention program. The NHA campus in Milwaukie, Oregon is preparing for re-building the Annie Ross Shelter and other buildings to increase the number of housing units at the site. NHA is working with SIN network to provide additional shelter services if needed while Annie Ross Housing is being re-constructed. NHA has secured a site on Pleasant Street and will be applying for funding to build up to 20 units of homeless veterans family housing.

Shelly Mead with Bridges to Change (B2C) explained that they provide transitional housing for persons exiting correctional facilities. B2C housing has services for homeless persons, persons who need alcohol and drug additions counseling and housing for sex offenders. B2C will be looking for additional funding for permanent affordable housing for persons leaving transitional housing services.

Emily and Amy with NEDCO explained that they were at the meeting to learn more about the Clackamas County funding and application process. NEDCO has provided foreclosure counseling, business incubation for food and beverage entrepreneurs, home ownership assistance as well as apartment deposit assistance for families with Section 8 vouchers. NEDCO is exploring options to assist youth who are aging out of foster care and into independent living. NEDCO would like to develop cottage housing to provide first time home owner options.

Mark thanked everyone for attending the meeting and providing information about needs in the county. Mark asked everyone to make sure they had signed in so that they could be added to the Citizen Participation list. The public meeting concluded at 7:15p.m.

Clackamas County Community Development  
Public Meeting Summary

6:00p.m. Tuesday, November 15, 2016  
150 Beaver creek Road, Rm 115  
Oregon City, Oregon

In Attendance:

Lori Mack, Community Solutions  
Jim Whynot, Public Works Director, City of Gladstone  
Mellani Calvin, Assist program  
Katie Ullrich, Proud Ground  
Tina Kennedy, Fort Kennedy  
Mark Sirosis, Project Coordinator, Community Development Program

Mark Sirosis, Community Development Division, opened the meeting at 6:00p.m. by thanking everyone for attending. Mark explained that the public meeting was a chance for community members to learn about the Community Development Program and the funding that HUD provides. The meeting also provides an opportunity to get information from citizens on the specific community needs and discuss any proposal ideas for housing and community development projects in the County.

Mark Sirosis continued by discussing the anticipated federal funding levels of approximately \$1.2 million dollars for projects in each coming year. Mark explained that this next 3-year funding cycle will be using an online application system. Mark handed out a Helpful Hints document and a ZoomGrants document to provide guidance on completing a CDBG or ESG project application using the online application. The application process opened on November 9 and will close on December 21, 2016. Funding will be awarded for 3 years of projects which is the first of 2 application funding cycles to complete a 5 year Consolidated Plan. Applicants should be awarded funds sometime in late February or early March 2017 after review and approval by the CDBG Program Policy Advisory Board. HCD will get notification from HUD in April about the actual allocations from HUD.

Mark opened the floor for people to introduce themselves and discuss the needs in the community and their particular project ideas.

Public Comments:

Lori Mack talked about the need for working with individuals living in poverty and providing job readiness training, intensive employment and career case management, access to employment skill building, customized job placement, and job retention. The Community Solutions employment program target populations are: residents of HACC, individuals served through Clackamas Women's Services, individuals successfully managing a mental illness, referrals

from the Oregon Youth Authority, Clackamas County Social Services, and the long term unemployed.

Katie Ullrich discussed Proud Ground's various programs including a home ownership program for low income families. Proud Ground maintains ownership of the land only. Families purchase the house, gain equity and may sell the house to another low income family.

Mellani Calvin, asked about possible funding for the Assist Program to help individuals with disabilities apply for social security benefits. The program would include home visits in Clackamas County to meet with individuals and families to complete the application process.

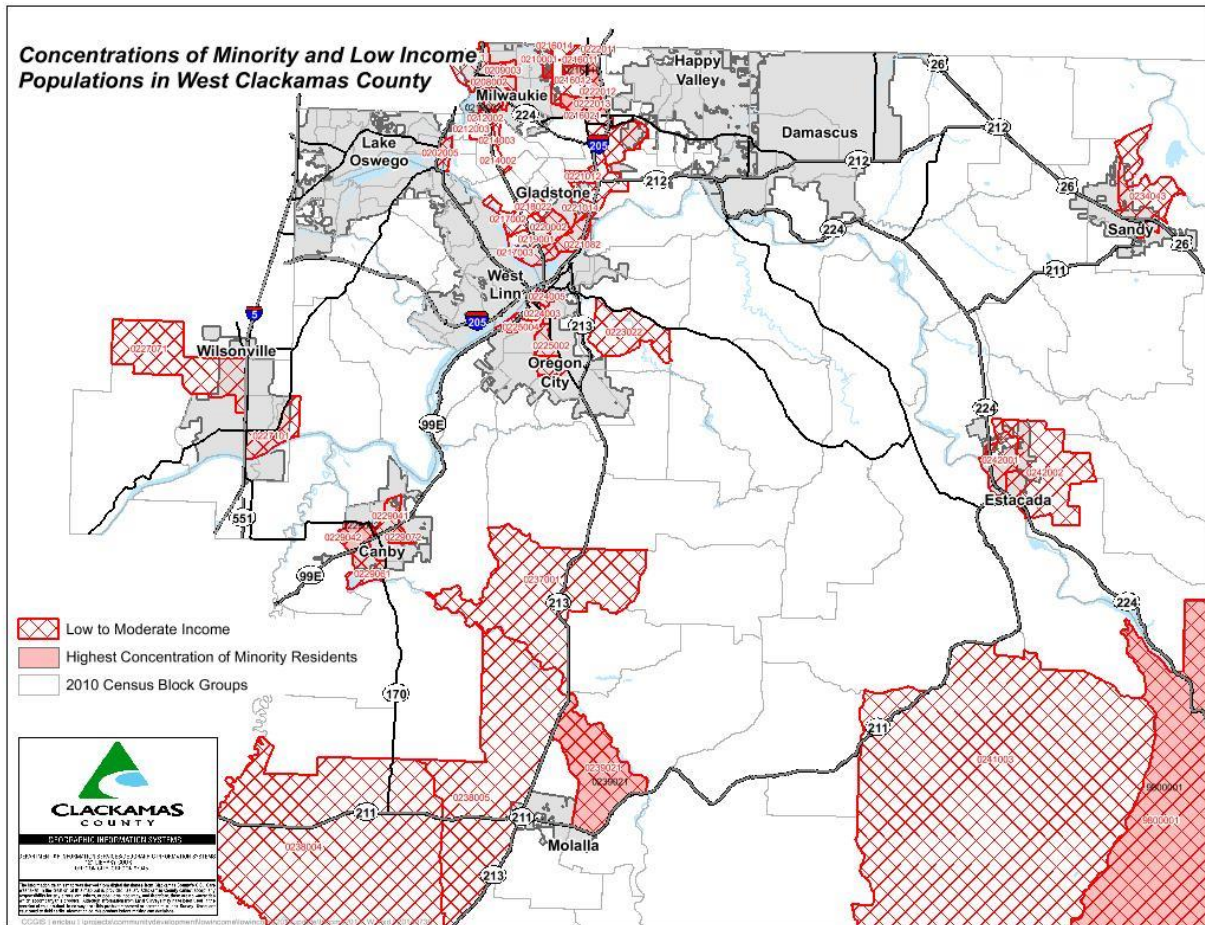
Jim Whynot with the City of Gladstone confirmed that he was working with his engineer to review potential street improvement projects and that the city would be submitting an application for CDBG funding.

Tina Kennedy asked about the funding for services for veterans in emergency and transitional housing. Funding can cover a 3 year period. Tina's group is working with the County Social Services Division to provide housing to homeless veterans.

Mark thanked everyone for attending the meeting and providing information about needs in the county. Mark asked everyone to make sure they had signed in so that they could be added to the Citizen Participation list. The public meeting concluded at 7:15p.m.

ADD Testimony from April 6, 2017 hearing here.....

Grantee Unique Appendices



## Appendix - Alternate/Local Data Sources

<b>1</b>	<p><b>Data Source Name</b></p> <p>Consolidated Plan Table 10</p>
	<p><b>List the name of the organization or individual who originated the data set.</b></p> <p>U.S. Census Bureau</p>
	<p><b>Provide a brief summary of the data set.</b></p> <p>Data set from Census Bureau CHAS and CON Plan Table 10</p>
	<p><b>What was the purpose for developing this data set?</b></p> <p>Since no other data is available for low income households with children present, Clackamas County uses the assumption that Small Related Households paying more than 50% of their incomes (Cost Burden &gt;50%) as listed in Table 10 is representative of families with children</p>
	<p><b>Provide the year (and optionally month, or month and day) for when the data was collected.</b></p> <p>2012</p>
	<p><b>Briefly describe the methodology for the data collection.</b></p> <p>Since no other data is available for low income households with children present, Clackamas County uses the assumption that Small Related Households paying more than 50% of their incomes (Cost Burden &gt;50%) as listed in Table 10 is representative of families with children</p>
	<p><b>Describe the total population from which the sample was taken.</b></p> <p>Since no other data is available for low income households with children present, Clackamas County uses the assumption that Small Related Households paying more than 50% of their incomes (Cost Burden &gt;50%) as listed in Table 10 is representative of families with children</p>
	<p><b>Describe the demographics of the respondents or characteristics of the unit of measure, and the number of respondents or units surveyed.</b></p> <p>Since no other data is available for low income households with children present, Clackamas County uses the assumption that Small Related Households paying more than 50% of their incomes (Cost Burden &gt;50%) as listed in Table 10 is representative of families with children</p>



April 6, 2017

Board of County Commissioner  
Clackamas County

Members of the Board:

**Approval of an Intra-Agency Services Agreement with Clackamas County Health Centers Behavioral Health Clinic (HC-BHC) and Clackamas County Behavioral Health Division (BHD) for the transfer of grant funds awarded for Supported Employment Services**

<b><u>Purpose/Outcomes</u></b>	Clackamas County Health Centers Behavioral Health Clinic (HC-BHC) to provide Supported Employment services to the uninsured and indigent residents of Clackamas County.
<b>Dollar Amount and Fiscal Impact</b>	Amount of financial award to be transferred shall not exceed <b>\$151,281</b> .
<b>Funding Source</b>	2015-2017 Community Mental Health Provider (“CMHP”) Intergovernmental Agreement #147783 through the Oregon Health Authority (“OHA”). No county general funds are involved.
<b>Duration</b>	Effective July 01, 2016 through June 30, 2017
<b>Previous Board Action</b>	NA (renewal of #7410)
<b>Strategic Plan Alignment</b>	1. Increase self-sufficiency for our clients. 2. Ensure safe, healthy and secure communities.
<b>Contact Person</b>	Mary Rumbaugh, Director, Behavioral Health Division 503-722-5305
<b>Contract No.</b>	7863

**BACKGROUND:**

The Clackamas County Behavioral Health Division (“BHD”), Housing & Human Services Department requests the approval of this Intra-Agency Services Agreement with the Clackamas County Health Centers Behavioral Health Clinic to provide Supported Employment services to the uninsured and indigent residents of Clackamas County. Supported Employment is an evidence-based practice with services intended to promote rehabilitation and return to productive employment. Programs use a team approach to engage and retain clients in treatment and provide the supports necessary to ensure success at the workplace.

The financial award came through the Community Mental Health Program (“CMHP”) Intergovernmental Agreement #147783. It is effective July 1, 2016 and terminates on June 30, 2017. Funding shall not exceed **\$151,281**. County Counsel reviewed this document on March 16, 2017. This Intra-Agency Agreement is retroactive due to a delayed receipt of funding from our grantor, combined with processing capacity.

**RECOMMENDATION:**

Staff recommends the Board approve this agreement and authorizes Richard Swift, H3S Director to sign on behalf of Clackamas County.

Respectfully submitted,

Richard Swift, Director  
Health, Housing & Human Services



**INTRA-AGENCY AGREEMENT  
BETWEEN  
CLACKAMAS HEALTH CENTERS  
BEHAVIORAL HEALTH CLINIC  
AND  
CLACKAMAS BEHAVIORAL HEALTH DIVISION**

**Agreement # 7863**

This agreement is made between **Clackamas County Health Centers Behavioral Health Clinic (HC-BHC)** and **Clackamas County Behavioral Health Division (BHD)**.

The services set forth under this Intra-Agency Agreement reflect required pass-through language from the 2015-2017 Community Mental Health Provider (CMHP) Intergovernmental Agreement between the BHD and the **Oregon Health Authority (OHA)** also referred to through this agreement as **(DEPARTMENT)**.

The parties agree as follows:

HC-BHC will provide Supported Employment services to the uninsured and indigent residents of Clackamas County as more fully described in Exhibit B, Scope of Work, attached hereto and incorporated herein.

**1.0 Term**

Services provided under the terms of this agreement shall commence **July 1, 2016**. This agreement shall terminate **June 30, 2017** unless terminated by one or both parties as provided for in paragraph 6.0 below. This agreement may be renewed annually and amended by mutual written consent of both parties.

**2.0 Compensation and Fiscal Records**

2.1 Compensation. BHD shall compensate HC-BHC as specified in Exhibit C, Compensation and Payment, for satisfactorily performing contracted services. The payment shall be full compensation for work performed, for services rendered, and for all labor, materials, supplies, equipment, mileage, and incidentals necessary to perform the work and services.

**Maximum payment to HC-BHC shall not exceed \$151,281.00.**

Clackamas County Health Centers Behavioral Health Clinic			
1	Job Dev Spec	\$	82,301
0.2	Program Supervisor	\$	23,276
	Materials & Supplies	\$	26,701
18%	Indirect & Alloc Costs	\$	19,004
		\$	151,281

2.2 Withholding of Contract Payments. Notwithstanding any other payment provision of this agreement, should HC-BHC fail to perform or document the performance of contracted services, BHD shall immediately withhold payments hereunder. Such withholding payment for cause may continue until HC-BHC performs required services or establishes to BHD'S satisfaction that such failure arose out of causes beyond the control, and without the fault or negligence, of HC-BHC.

2.3 Financial Records. HC-BHC and its subcontractors shall maintain complete and legible financial records pertinent to authorized Covered Services delivered and payments received. Such records shall be maintained in accordance with Generally Accepted Accounting Principles and/or other applicable accounting guidelines such as outlined in Office of Management and Budget circulars A-87, A-122 and A-133. Financial records and supporting documents shall be retained for at least five (5) years after final payment is made under this agreement or until all pending matters are resolved, whichever period is longer. If an audit of financial

records discloses that payments to HC-BHC were in excess of the amount to which HC-BHC was entitled, HC-BHC shall repay the amount of the excess to BHD.

### **3.0 Manner of Performance**

3.1 Compliance with Applicable Laws and Regulations, and Special Federal Requirements. HC-BHC shall comply with all Federal, State and local laws, rules and regulations applicable to work performed under this agreement, including, but not limited to, all applicable Federal and State civil rights and rehabilitation statutes, rules and regulations, and as listed in Exhibit F, Compliance with Applicable Law, attached hereto and incorporated herein. HC-BHC shall comply with OAR 410-120-1380, which establishes the requirements for compliance with Section 4751 of Omnibus Budget Reconciliation Act (OBRA) 1991 and ORS 127.649, Patient Self-Determination Act.

3.2 Subcontracts. HC-BHC shall not enter into any subcontracts for any of the work scheduled under this agreement without obtaining prior written approval from BHD. HC-BHC shall not be relieved of any of HC-BHC's obligations hereunder by virtue of any such subcontract, and shall remain directly responsible for compliance with all the terms of this agreement.

### **4.0 General Conditions**

4.1 Amendments. The terms of this agreement shall not be waived, altered, modified, supplemented, or amended, in any manner whatsoever, except by written instrument signed by HC-BHC and BHD.

4.2 Severability. If any term or provision of this agreement is declared by a court of competent jurisdiction to be illegal or in conflict with any law, the validity of the remaining terms or provisions shall not be affected, and the rights and obligations of the parties shall be construed and enforced as if the agreement did not contain the particular term or provision held to be invalid.

4.3 Waiver. The failure of either party to enforce any provision of this agreement shall not constitute a waiver of that or any other provision.

4.4 Future Support. BHD makes no commitment of future support and assumes no obligation for future support for the activity contracted herein except as set forth in this agreement.

4.5 Oregon Constitutional Limitations. This agreement is expressly subject to the debt limitation of Oregon counties set forth in Article XI, Section 10 of the Oregon Constitution, and is contingent upon funds being appropriated therefore. Any provisions herein, which would conflict with such law, are deemed inoperative to that extent.

4.6 Notice. Any notice under this Agreement shall be in writing and shall be effective when actually delivered or when deposited in the mail, addressed to the Parties as follows:

Clackamas County Behavioral Health Division (BHD)  
2051 Kaen Rd Suite 154  
Oregon City, OR 97045

Clackamas County Health Centers (HC-BHC)  
2051 Kaen Rd Suite 367  
Oregon City, OR 97045

### **5.0 Termination**

5.1 Termination Without Cause. This agreement may be terminated by mutual consent of both parties, or by either party upon ninety (90) business days notice, in writing and delivered by certified mail or in person.

5.2 Termination With Cause. BHD may terminate this agreement effective upon delivery of written notice to HC-BHC, or at such later date as may be established by BHD, under any of the following conditions:

5.2.1 Terms of the 2015-2017 Community Mental Health Provider (CMHP) Intergovernmental Agreement between the BHD and the DEPARTMENT are modified, changed or interpreted in such a way that the services are no longer allowable or appropriate for purchase under this contract or are no longer eligible for the funding authorized by this contract.

5.2.2 The termination, suspension or expiration of the 2015-2017 Community Mental Health Provider (CMHP) Intergovernmental Agreement between the BHD and the DEPARTMENT.

5.2.3 BHD funding from Federal, State, or other sources is not obtained and continued at levels sufficient to allow for purchase of the indicated quantity of services. Alternatively, the parties may agree to modify the agreement to accommodate a reduction in funding.

5.2.4 BHD has evidence that HC-BHC has endangered or is endangering the health or safety of clients, staff or the public. HC-BHC shall ensure the orderly and reasonable transfer of care in progress with clients and shall work with BHD staff to accomplish same.

5.2.5 The lapse, relinquishment, suspension, expiration, cancellation or termination of any required license, certification or qualification of HC-BHC, or the lapse, relinquishment, suspension, expiration, cancellation or termination of HC-BHC's insurance as required in this agreement.

5.2.6 HC-BHC's filing for protection under United States Bankruptcy Code, the appointment of a receiver to manage HC-BHC's affairs, or the judicial declaration that HC-BHC is insolvent.

5.2.7 If HC-BHC fails to perform any of the other provisions of this agreement, or fails to pursue the work of this agreement in accordance with its terms, and after receipt of written notice from BHD, fails to correct such failures within ten (10) business days or such longer period as BHD may authorize.

5.3 Notice of Default. BHD may also issue written notice of default (including breach of contract) to HC-BHC and terminate the whole or any part of this agreement if HC-BHC substantially fails to perform the following specific provisions: Exhibit D (2)(A) Licenses and, Certification; Exhibit D(2)(C) Quality Assurance and Utilization Review; and Exhibit D(3) Recordkeeping and Reporting. The rights and remedies of BHD related to defaults (including breach of contract) by HC-BHC shall not be exclusive and are in addition to any other rights and remedies provided by law or under this agreement.

5.4 Transition. Any such termination of this agreement shall be without prejudice to any obligations or liabilities of either party already accrued prior to such termination. HC-BHC and BHD shall continue to perform all duties and obligations under this agreement with respect to clients under care of HC-BHC to the date of termination.


This agreement consists of five (5) sections plus the following exhibits and attachments, which by this reference are incorporated herein:

Exhibit A	Definitions
Exhibit B	Scope of Work
Exhibit C	Compensation and Payment
Exhibit D	General Performance Standards


(Signature on following page)

SIGNATURE PAGE

**CLACKAMAS COUNTY  
HEALTH CENTERS DIVISION**

  
\_\_\_\_\_  
Deborah Cockrell  
Director  
3/23/2017  
\_\_\_\_\_  
Date

**CLACKAMAS COUNTY  
BEHAVIORAL HEALTH DIVISION**


  
\_\_\_\_\_  
Mary Rumbaugh  
Director  
3/16/17  
\_\_\_\_\_  
Date

**CLACKAMAS COUNTY  
HEALTH, HOUSING, AND HUMAN SERVICES DEPARTMENT**

\_\_\_\_\_  
Richard Swift  
Director

\_\_\_\_\_  
Date

Approved to Form

By:   
\_\_\_\_\_  
County Counsel  
3/16/17  
\_\_\_\_\_  
Date

April 6, 2017

Board of County Commissioners  
Clackamas County

Members of the Board:

Approval of HOME Loan Documents with  
Rosewood Terrace LP for the Rosewood Terrace Apartments Project

<b>Purpose/Outcomes</b>	HOME Program funds will assist in the development of the 212 unit Rosewood Terrace Apartments affordable housing project.
<b>Dollar Amount and Fiscal Impact</b>	Total HOME funds is \$900,000: <ul style="list-style-type: none"> <li>• \$900,000 long-term loan, 0.0% interest, 30-year term. No County General Funds are involved.</li> </ul>
<b>Funding Source</b>	The fund source is the FY15 and FY16 HOME Investment Partnerships Program allocations which the County receives annually from the US Department of Housing and Urban Development (HUD). No County General Funds are involved.
<b>Duration</b>	The term of the loan is 30 years, beginning at closing in June 2017 and ending June 2047. The HOME Period of Affordability is 20 years from date of project completion
<b>Previous Board Action/Review</b>	March 28, 2017 Study Session, Review of HOME Loan documents and HACC Disposition documents for the Rosewood Terrace Apartments
<b>Strategic Plan Alignment</b>	<ul style="list-style-type: none"> <li>• Increasing housing choice and housing opportunity for low to moderate income households.</li> <li>• Ensure safe, healthy and secure communities</li> </ul>
<b>Contact Person</b>	Kevin Ko, Manager, Housing & Community Development Division, 655-8359.
<b>Contract No.</b>	H3S 8243

**BACKGROUND:**

The Housing and Community Development Division of the Health, Housing and Human Services Department requests the approval of a HOME Loan Agreement and associated documents between Clackamas County and Pedcor Investments, LLC for the development of the Rosewood Terrace Apartments. Rosewood Terrace is new construction affordable housing project in Happy Valley. The site address is 8810 and 8850 SE Otty Road and is in close proximity to public transportation, shopping and commercial centers. The site was acquired by Pedcor in October 2015. There are currently two commercial structures on the site. The Owner is planning to demolish both structures and build six residential buildings containing a total of 212 units, with surface parking to accommodate the residents. All of the units will be made available to individuals and families earning at or below 60% of the Area Median Income (“AMI”) for Clackamas County, Oregon. The project will provide a high-quality, transit-oriented, affordable housing option to the workforce population of Clackamas County.

Area Median Income Chart

Household Size	Median Household Income	Income at 60% Median Household Income	Current Market Rent	Project Rent with Utilities	# of Bedrooms
1	\$51,500	\$30,900	\$1,063	\$761	1
2	\$58,800	\$35,280	\$1,242	\$909	2
3	\$66,200	\$39,720	\$1,371	\$1,044	3

Clackamas County receives HOME funds annually from the U.S. Department of Housing and Urban Development (HUD) as an entitlement jurisdiction. The HOME Program provides funds to non-profit and for-profit entities to develop, preserve and expand the affordable housing stock in Clackamas County. HOME funds are allocated to a project primarily as a loan, and are secured by a Trust Deed and Promissory Note. HOME assisted units are required to be affordable for an extended period of time (period of affordability) which is enforced by a written HOME Agreement and Declaration of Land Use and restrictive Covenants. For new construction projects like the Rosewood Terrace Apartments, the HOME period of affordability is 20 years from date of completion. An extended period of affordability may be required by other funding sources or preferred by the project sponsor.

Staff from the Health, Housing and Human Services Department (H3S) and the Housing Authority of Clackamas County (HACC) have been working with the Rosewood Terrace Apartments development team to address site and funding requirements, and is prepared to move forward with project development. The loan funds are necessary to fill the projected funding gap in the development budget. The estimated total project cost is \$63 million. The majority of the funds will come from:

Low Income Housing Tax Credit (Equity Investment)	\$20,180,000
Private Activity Bonds	\$32,000,000
HOME Loan	\$900,000
HACC Disposition Loan	\$1,100,000

The balance of the funds will come from rental income generated as the individual building are built and brought on line during construction, and from deferring the developer's fee which will be received within 15 years of project completion.

The environmental Assessment has been completed and HUD issued the Authority to Use Grant Funds on 01/26/2017. The HOME Loan documents were reviewed, revised and accepted by County Counsel on 03/06/2017.

**RECOMMENDATION:**

Pending the receipt of an executed HOME Loan Agreement from Pedcor, staff recommends Board approval of the HOME Loan Agreement with Pedcor Investments, LLC for the Rosewood Terrace Apartments and authorization for Richard Swift, H3S Director to sign on behalf of Clackamas County.

Respectfully submitted,

Richard Swift, Director  
Health, Housing and Human Services

# LOAN AGREEMENT CLACKAMAS COUNTY HOME PROGRAM

**Name of Project: Rosewood Terrace**

This Loan Agreement ("Agreement") is entered into between \_\_\_\_\_, ("Owner"), of which \_\_\_\_\_ is the sole member of the General Partner, and Clackamas County ("County"), a Participating Jurisdiction under the HOME Investment Partnerships Program ("HOME").

This Agreement includes the following attachments:

- |                             |  |
|-----------------------------|--|
| A. Legal Description        | E. HOME Affordability Requirements                         |
| B. Sources and Uses         | F. Affirmative Marketing and MBE/WBE Outreach Requirements |
| C. Schedule of Tasks        | G. Project Completion documentation                        |
| D. HOME Match Contributions |  |

The parties, in consideration of the mutual promises and obligations set forth below, agree as follows:

1. **DEFINITIONS.** Capitalized terms in this Agreement and in the other Loan Documents have the following definitions:
- a. **Annual Income.** Annual income as defined at 24 CFR 5.609.
  - b. **Affordability Requirements.** The Affordability Requirements refer to the restrictions on rents and tenant incomes set forth in Section 10 below.
  - c. **CHDO.** Community Housing Development Organization. This is a HOME specific designation. For the purposes of this Agreement, the CHDO (or a wholly owned subsidiary of the CHDO) must be the sole general partner or sole managing member of the actual ownership entity. There is no CHDO designated for this project.
  - d. **HOME-Assisted Units or HOME Unit.** HOME-Assisted units ("HOME units") are those units in the Project which were partially or totally rehabilitated, constructed, or otherwise assisted with the use of HOME Funds. The HOME-Assisted units are designated in Section 4 below.
  - e. **HOME Funds.** HOME Funds means the total amount of HOME Program dollars being provided by the County to the Project under this Agreement. See Section 2 below.
  - f. **HOME Program and HOME Regulations.** The federal HOME Investment Partnership Program (HOME Program) is authorized under Title II of the Cranston-Gonzalez National Affordable Housing Act of 1990. HUD's regulations and requirements for the HOME Program are located in 24 CFR Part 92. Should anything in this Agreement or the other Loan Documents conflict with the HOME regulations, the HOME regulations shall prevail.
  - g. **HUD.** The United States Department of Housing and Urban Development
  - h. **Loan Documents.** The Loan Documents are this Agreement, the Promissory Note, the Trust Deed, and the Declaration of Land Use Restrictive Covenants, all of which are incorporated into this Agreement by reference.
  - i. **Low-Income and Very Low-Income.** A Low-Income household is one whose total income does not exceed 80% of the County's Median Income. A Very Low-Income household is one whose total income does not exceed 50% of the County's Median Income.
  - j. **Median Income.** Median Income means the median income for Clackamas County, adjusted for family size, as published by HUD, from time to time.

- k. **Owner.** The initial Owner and any subsequent Project owner, subject to the County consenting to any transfer under Section 29 below.
- l. **Period of Affordability.** See Section 9 below.
- m. **Project.** The project will redevelop a 5.35-acre infill lot located at 8810-8850 SE Otty Road, Happy Valley, Clackamas County, OR 97086. The proposed project will demolish the existing structures and construct 212 rental apartment units dispersed amongst 6 residential structures; one of which will be mixed-use. Upon completion, the project will provide 104 one bedroom-one bath units, 100 two bedroom-two bath units and 8 three bedroom-two bath units. The purpose of the project is to provide a high-quality, transit-oriented, affordable housing option to the workforce population of Clackamas County. The legal description of the property is set forth in **Attachment A**.
- n. **Project Completion Date.** The later of the date when (a) the construction is completed, (b) the final HOME drawdown has been disbursed to the Project, and (c) the County has entered the project completion information into HUD's disbursement and information system. County must enter the project completion information into the HUD system, or otherwise provide it to HUD, within 120 days following the final project drawdown. **Addendum 1** to this Loan Agreement will be completed to recognize the actual project completion date. This date will start the HOME Period of Affordability (see Section 9 below).
- o. **Transfer.** For purposes of this Agreement, "Transfer" shall mean any sale, assignment or transfer, whether voluntary or involuntary, of (i) any rights and/or obligations under the Loan Documents and/or (ii) any interest in the Project; provided, however, that "Transfer" shall not mean (a) the leasing of one or more Units to an occupant in compliance with the Regulatory Agreement; or (b) the transfer of the Project to a limited partnership of which Owner (or a limited liability company of which Owner is the sole member) is the general partner or to a limited liability company of which Owner is the managing member. County shall approve other Transfers requested by Owner if the proposed transferee has the necessary qualifications and experience to construct the Development and/or own, operate and maintain the Project, as applicable, as contemplated by this Agreement and the Regulatory Agreement, as reasonably determined by Agency.

## **2. HOME FUNDS; LOAN TERMS**

- a. **Amount and Purpose:** County shall loan HOME funds in the amount of **\$900,000** to the **Owner** for the Project. The HOME funds will be used for the development of the Rosewood Terrace Apartments. Eligible activities include acquisition, demolition, construction, engineering and architectural services and other related activities. Use of the HOME funds for any other purpose, without the expressed written consent of the County is prohibited and may constitute a breach of this agreement.
- b. **Loan Terms:**
  - i. The HOME Funds will be provided as a **0.0% interest deferred payment loan, with a maturity date of 60 years**. Loan repayment, satisfaction or reconveyance shall not relieve Borrower of any performance, affordability or programmatic obligations and requirements of the HOME program.
  - ii. Notwithstanding the loan terms described above, the entire amount of the loan (\$900,000) together with any accrued interest or fees, shall be paid in full upon the sale, assignment or other transfer of title to the Property without the County's consent; or the date Owner or its agents or subcontractors is otherwise in default under any of the prior written Loan Documents (including but not limited to the failure to meet the Affordability Requirements of Section 10 below). Exceptions: Neither a transfer nor assignment of a limited partner's interest in Owner nor the removal of a general partner for cause, shall cause the Loan to be due and payable.
- c. **Loan Documents:** The loan shall be evidenced by this Agreement, a Promissory Note, and a Declaration of Land Use Restrictive Covenants, and secured by a Trust Deed executed by Owner in favor of the County all of which together are incorporated by reference into this Agreement and are referred to collectively as the "**Loan Documents**."
- d. **Recording Requirement:** The Owner agrees to record, or cause to be recorded the Trust Deed and the Declaration of Land Use Restrictive Covenants, promptly after signing and acquisition of the real property.



**3. PAYMENT OF OBLIGATION.**

- a. Payments of principal and interest shall be made until the loan is paid in full. All payments on the loan shall be applied first to the interest due on the loan and then the remaining amount shall be applied to the principal. No late fees will be charged.
- b. Payments shall be made at such place as County may designate in writing and shall be in the manner and amount as is described in the Promissory Note between the parties relating to this project.

**4. HOME-ASSISTED UNITS**

- a. Nine (9) units in the project are HOME-Assisted Units. The total number of HOME-Assisted units has been calculated on the total amount of HOME funds invested in the project, including, but not limited to, this loan. The HOME units are as follows:

Bedroom Size	TOTAL UNITS	Low-Home Units	High Home Units	Total HOME-Assisted
1-bedroom (tenant) unit:	104	1	2	3
2-bedroom (tenant) unit:	100	1	2	3
3-bedroom (tenant) unit:	8	0	0	0
<b>TOTALS</b>	<b>212</b>	<b>2</b>	<b>4</b>	<b>6</b>

- b. Fixed/Floating: The HOME-Assisted units are designated as **FLOATING HOME** units as defined at 24 CFR 92.252.
- c. See Section 10 below and Attachment E for rent and income limits for the HOME-Assisted Units.
- d. Special Needs Set-aside. A minimum of 5% of the units in the project (but not less than one) must be accessible to individuals with mobility impairment, and an additional 2%, at a minimum, of the units (but not less than one unit) must be accessible to individuals with sensory impairments

**5. SOURCES AND USES OF FUNDS; SCHEDULE OF TASKS**

- a. All sources and uses of funds for the acquisition phase of the Project are set forth in **Attachment B**. The Uses Statement shall specify by line item the source of funds for each such line item. Owner certifies that (i) it has, or will obtain, commitments of the funds from each of the sources identified, (ii) the sources of funds are sufficient to fund the project in full, and (iii) HOME funds shall only be used for HOME-eligible costs (see 24 CFR 92.206 and 92.214).
- b. The Schedule of Tasks to be undertaken in order to complete the Project is set forth in **Attachment C**.

**6. MATCH REQUIREMENT**

**Attachment D** documents the Project-related eligible sources of matching contributions as allowed by 24 CFR 92.218 through 92.222.

**7. HOME REGULATIONS**

The Owner agrees to comply with the HOME Regulations and with the other requirements of the Loan Documents. Specifically, the Owner agrees that \_\_\_\_\_ will remain as the sole member of the General Partner of Owner for the full duration of the initial period of affordability.

**8. ENVIRONMENTAL REVIEW**

- a. The environmental effects of each activity carried out with HOME funds must be assessed in accordance with the provisions of the National Environmental Policy Act of 1969 (NEPA) and the related authorities in 24 CFR Parts 50 and 58.
- b. The County is responsible for environmental review, decision-making, and action for each activity that it carries out with HOME funds, in accordance with 24 CFR part 58. The County will not commit any HOME funds toward construction of the Project before completion of the environmental review and approval of the request for release of funds and related certification, except as authorized by 24 CFR Part 58.
- c. HOME Funds cannot be used for acquisition or construction in identified special flood hazard areas unless the Project is subject to the mandatory purchase of flood insurance as required by Section 102(a) of the Flood Disaster Protection Act of 1973, as amended from time to time.

- d. In the event that changes or modifications to the approved HOME activities are necessary, the Owner must, prior to any additional commitment or expenditure of funds, submit all necessary supplemental environmental review information and data to the County for the purpose of updating the environmental review record.

#### **9. PERIOD OF AFFORDABILITY**

- a. **The Initial Period of Affordability is the HUD-required Period of Affordability. This shall be 20 years for all new HOME units**, without regard to the term of the loan or the transfer of ownership, except as noted in subsection d below. The Initial Period of Affordability begins on the Project Completion Date.
- b. The **Extended Period of Affordability, if any** begins at the end of the INITIAL Period of Affordability and continues for an additional 40 years or until such time as the loan is deemed paid in full.
- c. Unless specified otherwise, the Period of Affordability includes both the Initial and the Extended Periods of Affordability.
- d. **Termination of Period of Affordability.** In accordance with 24 CFR 92.252(e), the Period of Affordability shall be terminated upon foreclosure or transfer in lieu of foreclosure, but shall be revived according to the original terms if during the original Period of Affordability, the Owner of record before the foreclosure or deed in lieu of foreclosure, or any entity that includes the former Owner or any partner or those with whom the former Owner has or had family or business ties, obtains an ownership interest in the project or property.

#### **10. AFFORDABILITY REQUIREMENTS (RENTS AND TENANT INCOMES)**

- a. To ensure compliance with the HOME "Program Rule", at initial occupancy all of the HOME-Assisted Units must be rented to tenants whose incomes at the time of the tenant's initial occupancy, are less than or equal to 60% of the Median Income.
- b. **Low-HOME Units.** If the number of HOME-Assisted Units is 5 or more, at least 20% of the HOME-assisted units must be occupied initially and throughout the Period of Affordability by tenants, who at the time of their initial occupancy are very-low-income tenants and the initial rents for those units must not exceed the Low HOME rents shown in **Attachment E**. These rents are subject to periodic adjustment by HUD. If the unit receives federal or state project-based rental assistance, the Low-HOME rent shall not exceed the allowable rent under the rental assistance program.
- c. **High-HOME Units.** After initial occupancy as indicated in paragraph (a) above, the remaining HOME-Assisted Units must be rented during the Period of Affordability to tenants, who at the time of their initial occupancy are low-income tenants and the initial rents for these units must not exceed the High HOME rents shown in **Attachment E**. These rents are subject to periodic adjustments by HUD.
- d. Increases in Tenant's Income:
  - i. Low-HOME rent units
    1. If the income of a tenant in a Low-HOME rent unit rises above 50% of Median Income, but does not exceed 80% of Median Income, then the next available HOME-Assisted Unit (for fixed-unit projects) or the next available comparable unit (for floating-unit projects) must be rented to a very-low-income tenant. The unit occupied by the tenant whose income so increased becomes a High-HOME unit and the High-HOME rent must be charged, provided that in no event shall the rent of a tenant of a HOME-assisted unit that has been allocated federal low-income housing tax credits ("LIHTC") increase beyond the maximum applicable LIHTC rent for such unit.
    2. The rent for the unit occupied by the tenant whose income has increased above 80% of Median Income will be set in accordance with subparagraph iii below.
  - ii. High-HOME rent units
    1. The income of a tenant in a High-HOME rent unit can increase to 80% of Median Income with no change in the status as a HOME-Assisted Unit or in the tenant's rent.
    2. If the income of a tenant in a High-HOME rent unit rises above 80% of Median Income, then the next available HOME-Assisted Unit (for fixed-unit projects) or the next available comparable unit (for floating-unit projects) must be rented to a tenant whose income does not exceed 80% of Median Income.

3. The rent for the unit occupied by the tenant whose income has increased above 80% of Median Income will be set in accordance with subparagraph iii below.
  - iii. Project-based Rent Subsidy In accordance with 24 CFR 92.252(b)(2), if the unit receives federal or state project-based rental subsidy, the maximum rent is the rent allowable under the federal or state project-based rental subsidy program.
  - iv. Over-income Tenants In accordance with 24 CFR 92.252(i), a tenant who no longer qualifies as a low-income household must pay as rent 30 percent of the household's adjusted gross income, except that:
    1. In no event shall the tenant of a HOME-assisted unit that has been allocated LIHTCs be charged rent in excess of the maximum applicable LIHTC rent for such unit.
    2. If the HOME-assisted unit is a floating unit, a tenant who no longer qualifies as a low-income household is not required to pay as rent an amount that exceeds the market rent for a comparable unassisted unit in the neighborhood.
- e. Certification and Recertification of Tenant Income: Caritas must certify each tenant's household income, and must recertify such income annually in accordance with HOME regulations.

#### **11. TENANT SELECTION CRITERIA; LEASE REQUIREMENTS**

- a. Owner shall adopt written tenant selection policies and criteria, which must be pre-approved by the County. The criteria must: (i) be consistent with the purpose of providing housing for very-low-income and low-income households, (ii) be reasonably related to program eligibility and the applicant's ability to perform the lease obligations, (iii) provide for the selection of tenants from a written waiting list in the chronological order of their application, insofar as practicable, and (iv) give prompt written notification to any rejected applicant of the grounds for any rejection.
- b. Tenants must be offered renewable lease agreements with an initial duration of at least one year, unless a shorter time period is mutually agreed upon by the tenant and the landlord.
- c. In compliance with 24 CFR 92.252(d), neither the Owner nor Recipient may discriminate against rental assistance subsidy holders.
- d. Tenant leases may not contain any of the following provisions:
  - i. Agreement by the tenant to be sued or to have a judgment entered in favor of Owner;
  - ii. Except as allowed by Oregon law, agreement by the tenant to allow Owner to take, hold, or sell personal property of household members without notice to the tenant and a court decision on the rights of the parties;
  - iii. Agreement by the tenant not to hold Owner liable for any action or failure to act;
  - iv. Agreement by the tenant that Owner may institute a lawsuit without notice to the tenant;
  - v. Agreement by the tenant that Owner may evict tenant without instituting court proceedings in which the tenant has the opportunity to present a defense, or before a court decision on the rights of the parties.
  - vi. Agreement by the tenant to waive any right to a trial by jury, to waive the tenant's right to appeal, or otherwise challenge in court, a court decision in connection with the lease; or
  - vii. Agreement by the tenant to pay attorney fees or costs even if the tenant wins in a court proceeding against the Owner. The tenant may, however, be obligated to pay costs and attorney fees if the tenant loses.
- e. The Owner may not terminate the tenancy or refuse to renew the tenant's lease except for serious or repeated violation of the terms of the lease, for violation of law, for completion of the tenancy period for transitional housing, or for other good cause. To terminate or refuse to renew tenancy, Owner must serve written notice on the tenant specifying the grounds for the action at least 30 days before the termination of the tenancy.

#### **12. PROPERTY STANDARDS**

- a. Upon completion, the Project must meet all of the applicable Property Standards in 24 CFR 92.251 for new construction. County staff will periodically inspect the Project during construction and at completion to assure compliance with the Property Standards.
- b. Upon project completion and throughout the Period of Affordability, the Project must be maintained so that it continues to meet the property standards set forth in 24 CFR 92.251.

### **13. INDEMNIFICATION AND INSURANCE**

Owner agrees to indemnify, defend and hold harmless the County and its elected officials, officers, agents and employees against all liability, loss and costs arising from actions, suits, claims or demands, except when due to the County's sole negligence or intentional misconduct, arising from performance of this Agreement.

Owner shall maintain all-risk property insurance in the amount of the full replacement value of the property, commercial general liability insurance in the minimum amount of \$2,000,000 per occurrence, \$4,000,000 aggregate, and Rent Loss insurance in an amount equal to 12 months rental income. Owner shall provide County proof of insurance in the required amounts upon execution of this Agreement, and again upon request of the County. Owner shall give county no less than 30 days' notice if there is a cancellation, nonrenewal or material change of Owner's insurance. See paragraph 1.12 of the Trust Deed for additional insurance requirements.

Owner shall diligently undertake to repair or restore the property if damaged or destroyed, with such work commencing no later than 120 days after the damage or 30 days following receipt of the insurance proceeds and completed within one-year of the damage, and that the Owner is responsible to make up any insufficiency in insurance proceeds.

### **14. EVENTS OF DEFAULT**

An event of default under the Loan Documents includes, but is not limited to, the following; provided that the party declaring a default has first provided to the other party thirty days written notice specifying the alleged default and giving such other party the opportunity to cure the alleged default during that 30 day period, or during such longer period as is agreed to by the non-defaulting party in writing:

- Bankruptcy
- Non-payment of judgments within 30 days
- Suspension of business
- Dissolution or liquidation of Owner
- Liens against the property not paid in 60 days
- Construction abandoned for more than 15 days for cause not beyond reasonable control of developer
- Construction stopped by governmental authority or entitlement withdrawn or suspended
- Prohibited transfer
- Material misrepresentation
- Noncompliance with the Affordability Requirements at any time during the term of this Loan
- Default under other secured loans, foreclosure, bankruptcy, receivership and non-payment.

- a. Securing all Funding. The Owner must secure all fund sources identified in Attachment B, as evidenced by a commitment letter or similar agreement, within 12 months from the Effective Date identified in Section 31.
- b. Full Occupancy requirement. Within 18 months from the date of project completion, the project must achieve full occupancy. HOME assisted units must be occupied by HOME eligible households.

County agrees that any cure of any default made or tendered by Investor Member shall be deemed to be a cure by Owner and shall be accepted or rejected on the same basis as if made or tendered by Owner.

### **15. REMEDIES FOR DEFAULT**

- a. In the event of default, either party may pursue any legal or equitable remedy available to it. Without limiting the foregoing, County may (i) declare the entire amount of the Loan due and payable at once, or (ii) extend the Period of Affordability for a period equal to the length of the period during which noncompliance with the Affordability Requirements existed.

- b. The County and any tenant or applicant who meets the income limitation applicable under 24 CFR 92 (whether prospective, present or former occupant) shall be entitled, for any breach of the provisions hereof, and in addition to all other remedies provided by law or in equity, to enforce specific performance by the Owner and/or Recipient of its obligations under this Agreement in state court.

#### **16. AFFIRMATIVE MARKETING**

If the Project contains five or more HOME-Assisted Units, the Recipient must cause the Owner to implement and follow the adopted Affirmative Marketing Plan of the County, **Attachment F** (the "Plan"). The Recipient must cause the Owner to maintain records evidencing compliance with the Plan.

#### **17. MINORITY/WOMEN'S BUSINESS**

In accordance with Executive Orders 11625 and 12432 (concerning Minority Business Enterprise), and 12138 (concerning Women's Business Enterprise), the County has adopted procedures and requirements for HOME projects for the purpose of encouraging the use of minority and women's business enterprises. The Owner certifies that it will follow and implement the adopted procedures and requirements in **Attachment F**.

#### **18. NON-DISCRIMINATION**

- a. The Owner must comply with all applicable federal, state, and local laws prohibiting discrimination on the basis of age, sex, marital status, familial status, religion, race, creed, color, sexual orientation, nationality, the presence of any sensory, mental or physical handicap, or other protected class. These requirements apply to both employment opportunities and the provision of housing and are specified in
  - i. Title VI of the Civil Rights Act of 1964, as amended (42 U.S.C. 200d et seq.);
  - ii. Title VI; Civil Rights Act of 1968, Title VIII, as amended;
  - iii. Equal Employment Opportunity, Executive Order 11246, as amended;
  - iv. Section 3 of the Housing and Urban Development Act of 1968 as may be amended;
  - v. Section 504 of the Rehabilitation Act of 1973 as may be amended;
  - vi. The Fair Housing Act of 1988 as may be amended (42 U.S.C. 3601-3620);
  - vii. Equal Opportunity in Housing (Executive Order 11063, as amended by Executive Order 12259);
  - viii. Age Discrimination Act of 1975, as amended (42 U.S.C. 6101); and
  - ix. Americans with Disabilities Act of 1990 as may be amended (42 U.S.C. 12131; 47 U.S.C. 155, 201, 218, and 225).
- b. Owner shall maintain data on the extent to which each racial and ethnic group and single-headed household (by gender of head of household) have applied for and rented units in the Project.

#### **19. DISBURSEMENT OF FUNDS**

- a. Owner agrees to request funds under this Agreement only when they are needed for payment by Owner of specific allowable costs and only in amounts needed to pay such costs. The payment request must be accompanied by source documentation for actual expenses.
- b. The County shall verify requested amounts for satisfactory completion prior to payment. Payments shall be based upon work completed and approved by the County.
- c. County will not disburse any HOME funds until all the Loan Documents are signed and the following documents are received:
  - i. Copy of the Management Agreement;
  - ii. Affirmative Marketing Plan;
  - iii. Proof of Insurance;
  - iv. Copy of HOME tenant lease; and
  - v. Copy of the written tenant selection criteria.
- d. Other Submittals and Approvals

- i. Cost certification audit (this item should be submitted within 30 days of completion of construction and lease up, and is required to receive IRS Form 8609)
  - ii. Annual operating budget 60 days prior to beginning of the fiscal year for the Project
  - iii. Replacement reserve withdrawals within 30 days of such withdrawals, unless HACC approval is required in advance of any withdrawal
  - iv. Operating reserve withdrawals within 30 days of such withdrawals, unless HACC approval is required in advance of any withdrawal
  - v. Annual project financial statements/audit within 90 days of the end of the Project's fiscal year
  - vi. Pedcor financial statements/audit, within 90 days of the end of Pedcor's fiscal year
- e. Five percent (5%) of HOME funds will be withheld until the Owner provides the County with the documentation outlined in **Attachment G**.
- f. The Owner must submit Form HUD-40097 (Project Completion Report - Part C, household characteristics for each HOME-assisted unit) within 120 days of the request for final disbursement.

## **20. CONTRACTOR DEBARMENT AND SUSPENSION**

In order to comply with the requirements of 24 CFR Part 24, the Owner must obtain a certification guaranteeing that no participants in lower tier covered transactions, having to do with the Project financed in whole or in part by the HOME Funds, are currently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in federal projects.

## **21. SECTION 3 REQUIREMENTS**

Section 3 of the Housing and Urban Development Act of 1968, as amended, applies to:

- Projects for which HUD's share of the project cost exceeds \$200,000; and
- Contracts and subcontracts awarded on projects for which HUD's share of project costs exceeds \$200,000 and the contract or subcontract exceeds \$100,000.

Section 3 requires that to the greatest extent feasible opportunities for training and employment in connection with planning and carrying out the Project be given to low-income residents of the Project area, and contracts for work in connection with the Project be awarded to business concerns, including but not limited to individuals for firms doing business in the field of planning, consulting, design, architecture, building construction, rehabilitation, maintenance, or repair, which are located in or owned in substantial part by persons residing in the Project area.

## **22. LEAD BASED PAINT AND HAZARDOUS MATERIALS**

- a. For all units in the Project (not just HOME-Assisted Units) and for common areas, the Owner shall comply with the HUD Lead-Based Paint Regulations (24 CFR Part 35 and 24 CFR 982.401(j)) issued pursuant to the Lead-Based Paint Poisoning Prevention Act (42 USC Sections 4831 et. seq.) as amended requiring prohibition of the use of lead-based paint whenever HOME Funds are used directly or indirectly for construction, rehabilitation, or modernization of residential structures; elimination of immediate lead-based paint hazards in residential structures; and notification of the hazards of lead-based paint poisoning to purchasers and tenants of residential structures constructed prior to 1978. *This part is not applicable to new construction.*
- b. If, at any time, County has reason to believe that any release, discharge, or disposal of any Hazardous Substance affecting the Property or Improvements in violation of Environmental Law has occurred or is threatened, or if County has reason to believe that a violation of an Environmental Law has occurred or may occur with respect to the Property or Improvements, County may require Borrower to obtain or may itself obtain, at Borrower's expense, an environmental assessment of such condition or threatened condition by a qualified environmental consultant. Borrower shall promptly provide to County a complete copy of any environmental assessment obtained by Borrower.
- c. In the event that any investigation, site monitoring, containment, cleanup, removal, restoration, or other remedial work of any kind or nature (the "Remedial Work") is required under any applicable Environmental Law, any judicial order, or by any governmental agency or person because of, or in connection with, the current or future presence, suspected presence, release or suspected release of a Hazardous Substance on, under, or about all or any portion of the Property, or the contamination (whether presently existing or occurring after the date of this Trust Deed) of the buildings, facilities, soil, groundwater, surface water, air, or other elements on or under any other property as a result of Hazardous Substances emanating from the Property, Borrower shall, within 30 days after written demand by County for Borrower's performance under this provision

(or such shorter period of time as may be required under any applicable law, regulation, order, or agreement), commence and thereafter diligently prosecute to completion, all such Remedial Work. All costs and expenses of such Remedial Work shall be paid by Borrower including, without limitation, County's reasonable professional fees and costs incurred in connection with monitoring or review of the legal aspects of such Remedial Work. In the event Borrower shall fail to timely commence, or cause to be commenced, such Remedial Work, County may, but shall not be required to, cause such Remedial Work to be performed. In that event, all costs and expenses incurred in connection with the Remedial Work shall become part of the Obligations secured by this Trust Deed and shall bear interest at a rate of 8.0% per annum compounded annually until paid.

- d. Borrower shall hold County, its elected officials, directors, officers, employees, agents, successors, and assigns, harmless from, indemnify them for, and defend them against any and all losses, damages, liens, costs, expenses, and liabilities directly or indirectly arising out of or attributable to any violation of any Environmental Law, any breach of Borrower's warranties in this Section 1.06, or the use, generation, manufacture, production, storage, release, threatened release, discharge, disposal, or presence of a Hazardous Substance on, under, or about the Property, including without limitation the costs of any required repair, cleanup, containment, or detoxification of the Property, the preparation and implementation of any closure, remedial or other required plans, attorney fees and costs (including but not limited to those incurred in any proceeding and in any review or appeal), fees, penalties, and fines.
- e. To the best of Borrower's knowledge, Borrower represents and warrants to County that:
  - i. Neither the Property nor Borrower is in violation of any Environmental Law or subject to any existing, pending, or threatened investigation by any governmental authority under any Environmental Law.
  - ii. Borrower has not and is not required by any Environmental Law to obtain any permit or license other than those it has obtained to construct or use the Improvements.
  - iii. To the best of Borrower's knowledge, no Hazardous Substance has ever been used, generated, manufactured, produced, stored, released, discharged, or disposed of on, under, or about the Property in violation of any Environmental Law.
- f. All representations, warranties, and covenants in this Section 1.06 shall survive the satisfaction of the Obligations, the reconveyance of the Trust Property, or the foreclosure of this Trust Deed by any means.

### **23. DISPLACEMENT, RELOCATION, ACQUISITION, AND REPLACEMENT**

Owner shall comply with all the regulations and laws regarding displacement, relocation, acquisition and replacement of housing, including those contained in 24 CFR 92.353 and the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970 as amended (42 USC 4601-4655).

### **24. CONFLICT OF INTEREST**

Unless an exception is granted by the County pursuant to 24 CFR 92.356(f)(2), no developer, owner or sponsor of the Project, or officer, employee, agent or consultant of the Recipient, developer or sponsor, may occupy a HOME-Assisted Unit in the Project. This section does not apply to an employee or agent who occupies a HOME-Assisted Unit as the project manager or maintenance worker.

### **25. FAITH BASED ACTIVITIES**

- a. Organizations that are directly funded under the HOME program may not engage in inherently religious activities, such as worship, religious instruction, or proselytizing as part of the assistance funded under this part. If an organization conducts such activities, the activities must be offered separately, in time or location, from the assistance funded under this part, and participation must be voluntary for the beneficiaries of the assistance provided.
- b. An organization that participates in the HOME program shall not, in providing program assistance, discriminate against a program beneficiary, or prospective program beneficiary, on the basis of religion or religious belief.
- c. HOME funds may not be used for the acquisition, construction, or rehabilitation of structures to the extent that those structures are used for inherently religious activities. HOME funds may be used for the acquisition, construction, or rehabilitation of structures only to the extent that those structures are used for conducting eligible activities under this part.

## **26. RECORDS**

- a. Owner must keep such records as are necessary to demonstrate compliance with all parts of this Agreement, including but not limited to the affordability requirements, tenant lease provisions, property standards, affirmative marketing, anti-discrimination, Section 3, MBE/WBE, environmental review, relocation/displacement/property acquisition, labor requirements, lead-based paint, conflict of interest, debarment and suspension and intergovernmental review.
- b. Owner must annually provide tenant eligibility records to the County.
- c. Record Retention Periods
  - i. Except as stated in this subparagraph, records must be retained for five years following the Project Completion Date.
  - ii. Owner shall maintain records pertaining to each tenant's income verifications, project rents and project inspections for at least the most recent five year period, until five years after the Period of Affordability has expired.
  - iii. Written agreements must be retained for five years after the Agreement terminates.
  - iv. Records covering displacement and acquisition must be retained for five years after the date by which all persons displaced from the Property and all persons whose property is acquired for the Project have received the final payment to which they are entitled under 24 CFR 92.353.
  - v. If any litigation, claim, negotiation, audit, monitoring, inspection or other action has been started before the expiration of the required record retention period, records must be retained until completion of the action and resolution of all issues which arise from it, or until the end of the required period, whichever is later.
- d. Access to Records. HUD, the Comptroller General of the U.S., the County, and any of their representatives, have the right of access to any pertinent books, documents, papers or other records, in order to make audits, examinations, excerpts or transcripts, or otherwise determine compliance with HOME regulations.
- e. Any duly authorized representative of the Secretary of HUD, the Comptroller General of the United States, or the County shall at all reasonable times have access to and the right to inspect, copy audit, and examine all books, records and other documents relating directly to the Recipient's and/or Owner's receipt and disbursement of the HOME Funds, as well as access to the Project. Upon request, the Recipient must assist, or must cause Owner to assist, the County by serving notice to affected tenants, as required under Oregon Law.

## **27. MONITORING**

- a. Within 60 days of acquisition, the county staff will make an on-site visit to monitor compliance with the HOME rent and occupancy standards.
- b. The County will monitor PROJECT performance to ensure compliance with the requirements of this Agreement. During the initial Period of Affordability, the monitoring will be conducted in accordance with 24 CFR 92.504)c)(5)(d) and will include on-site inspections and a review of all records required in Section 26 above.

## **28. WAIVER**

Failure by either party to enforce any right under this Agreement shall not be deemed to be a waiver of that right or of any other right.

## **29. SUCCESSORS AND ASSIGNS**

This Agreement shall be binding on and inure to the benefit of the heirs, successors, and assigns of each party, provided that written consent is obtained from the other party.

## **30. AUTHORITY TO SIGN**

Each party signing this Agreement, and the other Loan Documents, represents that it has full power and authority to enter into this Agreement and all other documents contemplated thereby, and the persons signing this



Agreement for such party, if such party is not an individual, have full power and authority to sign for such party and to bind it to this Agreement, and to sell, transfer and convey all right, title, and interest in and to the Property in accordance with the Loan Documents. No further consent of any partner, shareholder, creditor, investor, judicial or administrative body, governmental authority, or other party is required.

**31. EFFECTIVE DATE**

The Effective Date of this Agreement is the date it is signed by all parties.

**PROJECT OWNER:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**CLACKAMAS COUNTY**

Chair: Jim Bernard  
Commissioner: Sonja Fischer  
Commissioner: Ken Hulbertson  
Commissioner: Paul Savas  
Commissioner: Martha Schrader

Signing on Behalf of BCC:

\_\_\_\_\_  
*(signature)*  
Printed Name:  
Title:  
DUNS#

\_\_\_\_\_  
Date

\_\_\_\_\_  
*(signature)*  
Printed Name: Richard Swift  
Title: Director, Health Housing and Human Services

\_\_\_\_\_  
Date

AFTER RECORDING RETURN TO:  
Clackamas County Community Development Division  
2051 Kaen Road, Suite 245  
Oregon City, OR 97045

STATUTORY NOTICE:  
The name and address of the entity holding a lien or other interest created by this instrument are set forth below, and the tax account number of the property subject to the lien or in which the interest is created is: Clackamas County Community Development Division

Legal Description – Exhibit "A" Attached

**TRUST DEED, ASSIGNMENT OF RENTS,  
SECURITY AGREEMENT AND FIXTURE FILING  
CLACKAMAS COUNTY HOME PROGRAM**

**Name of Project: Rosewood Terrace Apartments**

THIS TRUST DEED, ASSIGNMENT OF RENTS, SECURITY AGREEMENT, AND FIXTURE FILING (this "Trust Deed") is made as of \_\_\_\_\_, 2017 by Rosewood Terrace Limited Partnership ("Grantor" or "Borrower"), having its office at \_\_\_\_\_, to \_\_\_\_\_ ("Trustee" or "Title Company"), for the benefit of Clackamas County, a political subdivision of the State of Oregon, through its Community Development Division, having its office at 2051 Kaen Road, Oregon City, OR 97045 ("Beneficiary" or "County").

County has offered to make a **zero percent (0.0%) interest** loan to Borrower in the sum of **Nine Hundred Thousand and no/100 dollars (\$900,000.00)** under Title II of the National Affordable Housing Act of 1990, as amended, 42 U.S.C. 12701 et seq., and 24 CFR Part 92 (the "HOME" program). The loan is evidenced by this Trust Deed, a Promissory Note, a Loan Agreement and a Declaration of Land Use Restrictive Covenants, as they may be amended or supplemented from time to time, together referred to as the "**Loan Documents.**" Capitalized terms have the meaning set forth in the Loan Agreement, except as otherwise defined in this Trust Deed. The purpose(s) of the loan are set forth in the Loan Agreement entered into between the parties.

The loan is due and payable in full at the earliest of: (i) the Maturity Date which is exactly **thirty years from the executed date of this Trust Deed** except as otherwise provided in the Loan Agreement, (ii) the date the property is sold, (iii) title is transferred, or (iv) the Borrower defaults on any of its obligations under the Loan Documents (see Article 5.01 below).

The Initial HUD-required Period of Affordability shall be 20 years, without regard to the term of the loan or the transfer of ownership.

As a condition to the making of the loan to Borrower, Borrower has agreed to sign, deliver and record this Trust Deed.

For good consideration, receipt of which is acknowledged, and for the purpose of securing the Obligations described in Section 1.01 below, Borrower irrevocably grants, bargains, sells, conveys, assigns, and transfers to Title Company in trust for the benefit and security of the County, with power of sale and right of entry and possession, all of Borrower's right, title, and interest in and to the real property located in Clackamas County, Oregon, described as:

See **Exhibit A** attached hereto and incorporated herein,

Together with all the tenements, hereditaments and appurtenances and all other rights thereunto belonging or in any way now or hereafter appertaining, and the rents, issues and profits thereof, (the "Property"); together with all rights, titles and interests of Grantor, now owned or hereafter acquired, in and to any and all buildings and other improvements of every nature now or hereafter located on the Property and all fixtures now or hereafter attached to or used in connection with the Property and all appurtenances and additions to and substitutions and replacements of them (the "Improvements"). All of the above is sometimes referred to below as the "Trust Property."

PROVIDED ALWAYS, that if all the Obligations (as defined in Section 1.01 below) shall be paid, performed, and satisfied in full, then the lien and estate granted by this Trust Deed shall be reconveyed.

**BORROWER COVENANTS AND AGREES AS FOLLOWS:**

**ARTICLE I**

**Particular Covenants and Warranties of Borrower**

**1.01 Obligations Secured.** This Trust Deed secures the prompt payment of all indebtedness and other monetary obligations, including but not limited to principal and interest, and the prompt performance of all covenants and obligations of Borrower, under this Trust Deed and the other Loan Documents, whether such payment and performance is now due or becomes due in the future (the "Obligations").

**1.02 Property.** Borrower warrants that it holds good and merchantable title to the Property and the Improvements, free and clear of all liens, encumbrances, reservations, restrictions, easements, and adverse claims except those specifically listed in **Exhibit B**. Borrower covenants that it shall forever defend County's and Title Company's rights under this Trust Deed against the adverse claims and demands of all persons.

**1.03 [Reserved]**

**1.04 Further Assurances; Filing; Refiling; Etc.**

- 1) Borrower shall sign, acknowledge, and deliver, from time to time, such further instruments as County or Title Company may require to accomplish the purposes of this Trust Deed.
- 2) Borrower, immediately upon the signing and delivery of this Trust Deed, and thereafter from time to time, shall cause this Trust Deed, any supplemental security agreement, mortgage, or deed of trust and each instrument of further assurance, to be recorded and re-recorded in such manner and in such places as may be required by any present or future law in order to perfect, and continue perfected, the lien and estate of this Trust Deed.
- 3) Borrower shall pay all filing and recording fees, and all expenses incident to the signing, filing, recording, and acknowledgment of this Trust Deed; any security agreement, mortgage, or deed of trust supplemental hereto and any instrument of further assurance; and all federal, state, county, and municipal taxes, assessments and charges arising out of or in connection with the signing, delivery, filing, and recording of this Trust Deed, any supplemental security agreement, mortgage, or deed of trust and any instrument of further assurance.

**1.05 Compliance with Laws.** Borrower represents, warrants, and covenants that:

- 1) The Property has been or will be developed, and all improvements, if any, have been or will be constructed and maintained, in full compliance with all applicable laws, statutes, ordinances, regulations, and codes of all federal, state, and local governments, including the HOME requirements (collectively "Laws"), and all covenants, conditions, easements, and restrictions affecting the Trust Property (collectively "Covenants"); and
- 2) Borrower and its operations upon the Trust Property currently comply, and will comply in all material respects with all applicable Laws and Covenants.

**1.06 Definitions; Environmental Covenants; Warranties and Compliance**

- 1) For purposes of this section, "Environmental Law" means any federal, state, or local law, statute, ordinance, or regulation pertaining to Hazardous Substances, health, industrial hygiene, or environmental conditions, including without limitation the Comprehensive Environmental Response, Compensation, and Liability Act of 1980 ("CERCLA"), as amended, 42 USC §9601-9675, and the Resource Conservation and Recovery Act of 1976 ("RCRA"), as amended, 42 USC §6901-6992.
- 2) For the purposes of this section, "Hazardous Substance" includes, without limitation, any material, substance, or waste that is or becomes regulated or that is or becomes classified as hazardous, dangerous, or toxic under any federal, state, or local statute, ordinance, rule, regulation, or law.
- 3) Borrower will not use, generate, manufacture, produce, store, release, discharge, or dispose of on, under or about the Property or the Property's groundwater, or transport to or from the Property, any Hazardous Substance and will not permit any other person to do so, except for such Hazardous Substances that may be used in the ordinary course of Borrower's business and in compliance with all Environmental Laws, including but not limited to those relating to licensure, notice, and record keeping.
- 4) Borrower will keep and maintain the Property in compliance with, and shall not cause or permit all or any portion of the Property, including groundwater, to be in violation of any Environmental Law.
- 5) Borrower shall give prompt written notice to County of:
  - (a) Any proceeding, inquiry, or notice by or from any governmental authority with respect to any alleged violation of any Environmental Law or the presence of any Hazardous Substance on the Property or the migration of any Hazardous Substance from or to other premises;
  - (b) All known claims made or threatened by any person against Borrower or with respect to the Property or Improvements relating to any loss or injury resulting from any Hazardous Substance or the violation of any Environmental Law;
  - (c) The existence of any Hazardous Substance on or about all or any portion of the Property in violation of Environmental Law; or
  - (d) Borrower's discovery of any occurrence or condition on any real property adjoining or in the vicinity of the Property that could in Borrower's judgment cause any restrictions on the ownership, occupancy, transferability, or use of the Property under any Environmental Law.
- 6) Borrower shall promptly provide to County copies of all reports, documents, and notices provided to or received from any agency administering any Environmental Laws. County shall have the right to join and participate, in its own name if it so elects, in any legal proceeding or action initiated with respect to the Property or Improvements in connection with any Environmental Law and have its attorney fees in connection with such an action paid by

Borrower, if County determines that such participation is reasonably necessary to protect its interest in the Trust Property.

- 7) If, at any time, County has reason to believe that any release, discharge, or disposal of any Hazardous Substance affecting the Property or Improvements in violation of Environmental Law has occurred or is threatened, or if County has reason to believe that a violation of an Environmental Law has occurred or may occur with respect to the Property or Improvements, County may require Borrower to obtain or may itself obtain, at Borrower's expense, an environmental assessment of such condition or threatened condition by a qualified environmental consultant. Borrower shall promptly provide to County a complete copy of any environmental assessment obtained by Borrower.
- 8) In the event that any investigation, site monitoring, containment, cleanup, removal, restoration, or other remedial work of any kind or nature (the "Remedial Work") is required under any applicable Environmental Law, any judicial order, or by any governmental agency or person because of, or in connection with, the current or future presence, suspected presence, release or suspected release of a Hazardous Substance on, under, or about all or any portion of the Property, or the contamination (whether presently existing or occurring after the date of this Trust Deed) of the buildings, facilities, soil, groundwater, surface water, air, or other elements on or under any other property as a result of Hazardous Substances emanating from the Property, Borrower shall, within 30 days after written demand by County for Borrower's performance under this provision (or such shorter period of time as may be required under any applicable law, regulation, order, or agreement), commence and thereafter diligently prosecute to completion, all such Remedial Work. All costs and expenses of such Remedial Work shall be paid by Borrower including, without limitation, County's reasonable professional fees and costs incurred in connection with monitoring or review of the legal aspects of such Remedial Work. In the event Borrower shall fail to timely commence, or cause to be commenced, such Remedial Work, County may, but shall not be required to, cause such Remedial Work to be performed. In that event, all costs and expenses incurred in connection with the Remedial Work shall become part of the Obligations secured by this Trust Deed and shall bear interest at a rate of 8.0% per annum compounded annually until paid.
- 9) Borrower shall hold County, its elected officials, directors, officers, employees, agents, successors, and assigns, harmless from, indemnify them for, and defend them against any and all losses, damages, liens, costs, expenses, and liabilities directly or indirectly arising out of or attributable to any violation of any Environmental Law, any breach of Borrower's warranties in this Section 1.06, or the use, generation, manufacture, production, storage, release, threatened release, discharge, disposal, or presence of a Hazardous Substance on, under, or about the Property, including without limitation the costs of any required repair, cleanup, containment, or detoxification of the Property, the preparation and implementation of any closure, remedial or other required plans, attorney fees and costs (including but not limited to those incurred in any proceeding and in any review or appeal), fees, penalties, and fines.
- 10) To the best of Borrower's knowledge, Borrower represents and warrants to County that:
  - (a) Neither the Property nor Borrower is in violation of any Environmental Law or subject to any existing, pending, or threatened investigation by any governmental authority under any Environmental Law.
  - (b) Borrower has not and is not required by any Environmental Law to obtain any permit or license other than those it has obtained to construct or use the Improvements.
  - (c) To the best of Borrower's knowledge, no Hazardous Substance has ever been used, generated, manufactured, produced, stored, released, discharged, or disposed of on, under, or about the Property in violation of any Environmental Law.
- 11) All representations, warranties, and covenants in this Section 1.06 shall survive the satisfaction of the Obligations, the reconveyance of the Trust Property, or the foreclosure of this Trust Deed by any means.

**1.07 Maintenance and Improvements.** Borrower shall not permit all or any part of the Improvements to be removed, demolished, or materially altered without County's prior written consent; provided, however, that Borrower may remove, demolish, or materially alter such Improvements as become obsolete in the usual conduct of Borrower's business, if the removal or material alteration does not materially detract from the operation of the Borrower's business and if all Improvements that are demolished or removed are promptly replaced with Improvements of like value and quality. Borrower shall maintain every portion of the Property and Improvements in good repair, working order, and condition, so that it continues to meet the property standards set forth in 24 CFR 92.251, and shall at County's election and Borrower's cost, restore, replace, or rebuild all or any part of the Improvements now or hereafter damaged or destroyed by any casualty (whether or not insured against or insurable) or affected by any Condemnation (as defined in Section 2.01 below) pursuant to Sections 1.14 and 2.01, as applicable. Borrower shall not commit, permit, or suffer any waste, strip, or deterioration of the Trust Property, reasonable wear and tear excepted.

**1.08 Liens.** Subject to subparagraph 1.09(2), Borrower shall pay when due all claims for labor, materials, or supplies that if unpaid might become a lien on all or any portion of the Trust Property. Subject to subparagraph 1.09(2), Borrower shall not create, or suffer, or permit to be created, any mortgage, deed of trust, lien, security interest, charge, or encumbrance upon the Trust Property prior to, on a parity with, or subordinate to the lien of this Trust Deed, except as specifically provided in Exhibit B.

**1.09 Impositions**

- 1) Borrower shall pay or cause to be paid, when due and before any fine, penalty, interest, or cost attaches, all taxes, assessments, fees, levies, and all other governmental and nongovernmental charges assessed or levied against any part of the Trust Property (the "Impositions"); provided, however, that if such Imposition may be paid in installments, Borrower may pay the same in installments, together with accrued interest on the unpaid balance, as the same become due, before any fine, penalty, or cost attaches.
- 2) Borrower may, at its expense and after prior notice to County, contest by appropriate legal, administrative, or other proceedings conducted in good faith and with due diligence, the amount, validity, or application of any Imposition or lien on the Trust Property or any claim of any laborer, material man, supplier, or vendor or lien, and

may withhold payment of the same pending completion of such proceedings if permitted by law, provided that (a) such proceedings shall suspend collection from the Trust Property; (b) no part of or interest in the Trust Property will be sold, forfeited, or lost if Borrower pays the amount or satisfies the condition being contested, and Borrower would have the opportunity to do so in the event of Borrower's failure to prevail in the contest; (c) neither County nor Title Company shall, by virtue of such permitted contest, be exposed to any risk of liability for which Borrower has not furnished additional security as provided in clause (d) below; and (d) Borrower shall have furnished to County cash, corporate surety bond, or other additional security in the amount determined by County with respect of the claim being contested or the loss or damage that may result from Borrower's failure to prevail in such contest in an amount sufficient to discharge the Imposition and all interest, costs, attorney fees, and other charges that may accrue in connection with the Imposition. Borrower shall promptly satisfy any final judgment.

- 3) Borrower shall furnish to County, promptly upon request, satisfactory evidence of the payment of all Impositions. County is authorized to request and receive from the responsible governmental and non-governmental personnel written statements with respect to the accrual and payment of all Impositions.

**1.10 Books and Records; Inspection of the Property.** Borrower shall keep complete and accurate records and books of account with respect to the Trust Property and its operation in accordance with generally accepted accounting principles consistently applied, and in accordance with the record-keeping requirements of the Loan Agreement. Borrower shall permit Title Company, County, the Secretary of HUD and the Comptroller General of the U.S., and their authorized representatives to enter and inspect the Property and the Improvements, and to examine and make copies or extracts of the records and books of account of the Borrower with respect to the Property and the Improvements, all at such reasonable times as County or Title Company may choose.

**1.11 Limitations of Use.** Borrower shall not initiate, join in, or consent to any rezoning of the Property or any change in any Covenant or other public or private restrictions limiting or defining the uses that may be made of all or any part of the Property and the Improvements without the prior written consent of County.

#### **1.12 Insurance**

- 1) Property and Other Insurance. Borrower shall obtain and maintain in full force and effect during the term of this Trust Deed:
  - (a) Causes of Loss – Special Form property insurance together with endorsements for replacement cost, inflation adjustment, malicious mischief, and sprinkler damage coverages, all in amounts not less than the full replacement cost of all Improvements, without reduction for co-insurance;
  - (b) Commercial general liability insurance, including liabilities assumed under contract, with limits, coverages, and risks insured acceptable to County, and in no event less than \$2,000,000 per occurrence and \$4,000,000 aggregate coverage; and
  - (c) Unless County otherwise agrees in writing, rent loss or business interruption insurance in an amount no less than the total annual rents provided for in all leases for the Trust Property. In addition, Borrower shall obtain and maintain all such other insurance coverages, which at the time are commonly carried for similar property, in such amounts as County may require.
- 2) Insurance Companies and Policies. Insurer must be authorized to do business in Oregon. All insurance shall be written by a company or companies reasonably acceptable to County with a rating of A VIII or better as provided in Best's Rating Guide; shall contain a long form mortgagee clause in favor of County with loss proceeds under any policy payable to County, subject to the terms of this Trust Deed and the rights of any superior mortgagee or trust deed beneficiary or as provided in Section 6.10 below; shall require 30 days' prior written notice to County of cancellation or reduction in coverage; shall contain waivers of subrogation and endorsements that no act or negligence of Borrower or any occupant, and no occupancy or use of the Property for purposes more hazardous than permitted by the terms of the policy will affect the validity or enforceability of such insurance as against County; shall be in full force and effect on the date of this Trust Deed; and shall be accompanied by proof of premiums paid for the current policy year. County shall be named as additional insured on all liability policies. Borrower shall forward to County, upon request, certificates evidencing the coverages required under this Trust Deed and copies of all policies.
- 3) Blanket Policy. If a blanket policy is issued, a certified copy of such policy shall be furnished together with a certificate indicating that the Trust Property and County are insured under such policy in the proper designated amount.
- 4) Insurance Proceeds. All proceeds from any insurance on the Trust Property shall be used in accordance with the provisions of Section 1.14.

**1.13 Assignments of Policies upon Foreclosure.** In the event of foreclosure of the lien of this Trust Deed or other transfer of title, or assignment of the Trust Property in whole or in part, all right, title, and interest of Borrower in and to all policies of insurance procured under Section 1.12 shall inure to the benefit of and pass to the successors in interest of Borrower or the purchaser or grantee of all or any part of the Trust Property.

#### **1.14 Casualty/Loss Restoration**

- 1) After the occurrence of any casualty to the Property, whether or not required to be insured against as provided in this Trust Deed, Borrower shall give prompt written notice of the casualty to County, specifically describing the nature and cause of such casualty and the extent of the damage or destruction to the Trust Property. County may make proof of loss if it is not made promptly and to County's satisfaction by Borrower.
- 2) Subject to the rights of any superior mortgagee or trust deed beneficiary as provided in Section 6.10 below, Borrower assigns to County all insurance proceeds that Borrower may be entitled to receive with respect to any casualty. All insurance proceeds shall be held by County as collateral to secure performance of the Obligations secured by this Trust Deed. Provided that Borrower is not in default under this Trust Deed, County shall permit such amounts of the insurance proceeds to be used by Borrower for repair or restoration of the Improvements

(subject to disbursement procedures established by County) if Borrower can demonstrate, to County's satisfaction, that subsequent to such repair or restoration, the Trust Property shall have a value of not less than 100% of the then-outstanding balance of the indebtedness secured by this Trust Deed. Any excess insurance proceeds shall be applied by County toward payment of all or part of the indebtedness secured by this Trust Deed in such order as County may determine.

#### **1.15 Actions to Protect Trust Property; Reserves**

- 1) If Borrower shall fail to obtain the insurance required by Section 1.12, make the payments required by Section 1.09 (other than payments that Borrower is contesting in accordance with Section 1.09(2)), or perform or observe any of its other covenants or agreements under this Trust Deed, County may, without obligation to do so, obtain or pay the same or take other action that it deems appropriate to remedy such failure; provided that County shall first give notice to Borrower of such failure and a reasonable opportunity to cure such failure. All sums, including reasonable attorney fees, so expended or expended to maintain the lien or estate of this Trust Deed or its priority, or to protect or enforce any of County's rights, or to recover any indebtedness secured by this Trust Deed, shall be a lien on the Trust Property, shall be secured by this Trust Deed, and shall be paid by Borrower upon demand, together with interest at the rate provided in the Note. No payment or other action by County under this section shall impair any other right or remedy available to County or constitute a waiver of any default.
- 2) If Borrower fails to promptly perform any of its obligations under Section 1.09 or 1.12 of this Trust Deed, County may require Borrower thereafter to pay and maintain with County reserves for payment of such obligations. In that event, Borrower shall pay to County each month a sum estimated by County to be sufficient to produce, at least 20 days before due, an amount equal to the Impositions and/or insurance premiums. If the sums so paid are insufficient to satisfy any Imposition or insurance premium when due, Borrower shall pay any deficiency to County upon demand. The reserves may be commingled with County's other funds, and County shall not be required to pay interest to Borrower on such reserves. County shall not hold the reserve in trust for Borrower, and County shall not be the agent of Borrower for payment of the taxes and assessments required to be paid by Borrower.

**1.16 Insurance Warning. Unless Borrower provides County with evidence of the insurance coverage required by the Loan Documents, County may purchase insurance at Borrower's expense to protect County's interest.** This insurance may, but need not, also protect Borrower's interest. If the Trust Property becomes damaged, the coverage County purchases may not pay any claim Borrower makes or any claim made against Borrower. Borrower may later cancel this coverage by providing evidence that Borrower has obtained property coverage elsewhere.

Borrower is responsible for the cost of any insurance purchased by County. The cost of this insurance may be added to Borrower's loan balance. If the cost is added to Borrower's loan balance, the interest rate of 8.0% per annum compounded annually will apply to this added amount. The effective date of coverage may be the date Borrower's prior coverage lapsed or the date Borrower failed to provide proof of coverage.

The coverage County purchases may be considerably more expensive than insurance Borrower can obtain on its own and may not satisfy any need for property damage coverage or any mandatory liability insurance requirements imposed by applicable law.

**1.17 Estoppel Certificates.** Borrower, within five days of the request, shall furnish Title Company and County a written statement, duly acknowledged, of the amount of the Obligations secured by this Trust Deed and whether any offsets or defenses exist against such Obligations. If Borrower shall fail to furnish such a statement within the time allowed, County shall be authorized, as Borrower's attorney-in-fact, to sign and deliver such statement.

**1.18 Financial Information.** Borrower shall furnish to County within 90 days after the end of each of Borrower's fiscal years a complete copy of Borrower's financial statement for such year, audited or reviewed by a certified public accountant (including balance sheet, income statement, and statement of changes in financial position). Borrower shall promptly furnish to County any and all such other financial information as County shall reasonably request from time to time.

## **ARTICLE II Condemnation**

#### **2.01 Condemnation**

- 1) Should any part of or interest in the Trust Property be taken or damaged by reason of any public improvement, eminent domain, condemnation proceeding, or in any similar manner (a "Condemnation"), or should Borrower receive any notice or other information regarding such action, Borrower shall give immediate notice of such action to County.
- 2) Subject to the rights of any superior mortgagee or trust deed beneficiary as provided in Section 6.10 below, County shall be entitled to all compensation, awards, and other payments or relief ("Condemnation Proceeds") up to the full amount of the Obligations, and shall be entitled, at its option, to commence, appear in, and prosecute any Condemnation proceeding in its own or Borrower's name and make any compromise or settlement in connection with such Condemnation. In the event the Trust Property is taken in its entirety by condemnation, all Obligations secured by this Trust Deed, at County's election, shall become immediately due and collectible.
- 3) All condemnation proceeds shall be held by County as collateral to secure performance of the Obligations secured by this Trust Deed. Provided that Borrower is not in default under this Trust Deed, County shall permit such amounts of the condemnation proceeds to be used by Borrower for repair or restoration of the Improvements (subject to reasonable disbursement procedures established by County) if Borrower can demonstrate, to County's reasonable satisfaction, that subsequent to such repair or restoration, the Trust Property shall have a value of not less than 100% of the then-outstanding balance of the indebtedness secured by this Trust Deed. Any excess condemnation proceeds shall be applied by County toward payment of all or part of the indebtedness secured by this Trust Deed in such order as County may determine.

### ARTICLE III

#### Assignment of Leases, Rents, Issues, and Profits

**3.01 Assignment.** Borrower assigns and transfers to County (1) all leases, subleases, licenses, rental contracts, and other agreements, whether now existing or hereafter arising, and relating to the occupancy or use of all or any portion of the Trust Property, including all modifications, extensions, and renewals thereof (the "Leases"), and (2) all rents, revenues, issues, profits, income, proceeds, and benefits derived from the Trust Property and the lease, rental, or license of all or any portion thereof, including but not limited to lease and security deposits (collectively, the "Rents"). Borrower certifies that the Rents have not been currently assigned to any third party. This assignment is intended by Borrower and County to create a present and unconditional assignment to County subject only to the license set forth in Section 3.04 below.

**3.02 Rights of County.** Subject to the provisions of Section 3.04 below giving Borrower a revocable, limited license, County shall have the right, power, and authority to:

- 1) Notify any and all tenants, renters, licensees, and other obligors under any of the Leases that the same have been assigned to County and that all Rents are to be paid directly to County, whether or not County shall have foreclosed or commenced foreclosure proceedings against the Trust Property, and whether or not County has taken possession of the Trust Property;
- 2) Discount, settle, compromise, release, or extend the time for payment of, any amounts owing under any of the Leases and any Rents, in whole or in part, on terms acceptable to County;
- 3) Collect and enforce payment of Rents and all provisions of the Leases, and to prosecute any action or proceeding, in the name of Borrower or County, with respect to any and all Leases and Rents; and
- 4) Exercise any and all other rights and remedies of the lessor in connection with any of the Leases and Rents.

**3.03 Application of Receipts.** County shall have the right, power, and authority to use and apply any Rents received under this Trust Deed (1) for the payment of any and all costs and expenses incurred in connection with enforcing or defending the terms of this assignment or the rights of County, and in collecting any Rents, including internal personnel costs; and (2) for the operation and maintenance of the Trust Property and the payment of all costs and expenses in connection therewith, including but not limited to the payment of utilities, taxes, assessments, governmental charges, and insurance. After the payment of all such costs and expenses and after County shall have set up such reserves as it shall deem necessary in its sole discretion for the proper management of the Trust Property, County shall apply all remaining Rents collected and received by it to the reduction of the Obligations in such order as County shall determine. The exercise or failure by County to exercise any of the rights or powers granted in this assignment shall not constitute a waiver of default by Borrower under this Trust Deed, the Note, or any of the other Loan Documents.

**3.04 License.** County grants to Borrower a revocable license to collect and receive the Rents. Such a license may be revoked by County, without further notice to Borrower, other than the notice required by Article 5.01, if Borrower defaults under Article III or any other term of the loan documents. Unless and until a license is revoked, Borrower agrees to apply the proceeds of Rents to ownership obligations, taxes, assessments, governmental charges, insurance premiums, and other obligations associated with the Trust Property, and to maintenance of the Trust Property, before using Rent proceeds for any other purpose.

Borrower agrees:

- 1) To observe and perform all Lease obligations;
- 2) To enforce, or secure the performance of, every obligation required of lessees and other parties under the Leases;
- 3) To appear in and defend any action or proceeding arising out of, or connected with, the Leases or Rents, at Borrower's sole expense; and
- 4) To obtain County's prior written approval of the form and content of all future Leases.

Upon request of County, Borrower agrees:

- 1) To collect Rents no earlier than 30 days in advance of the day when they are due, and
- 2) Not to accept any payments under the Leases other than Rent, except for bona fide security deposits up to an amount equivalent to two months' rent.

**3.05 Limitation of County's Obligations.** Notwithstanding the assignment provided for in this Article III, County shall not be obligated to perform or discharge, and County does not undertake to perform or discharge, any obligation or liability with respect to the Leases or the Rents. This assignment shall not operate to place responsibility for the control, care, maintenance, or repair of the Trust Property upon County, or to make County responsible for any condition of the Property. County shall be accountable to Borrower only for the sums actually collected and received by County pursuant to this assignment. Borrower shall hold County fully harmless from, indemnify County for, and defend County against any and all claims, demands, liabilities, losses, damages, and expenses, including reasonable attorney fees, arising out of any of the Leases, with respect to any of the Rents, or in connection with any claim that may be asserted against County on account of this assignment or any obligation or undertaking alleged to arise therefrom, other than such claims resulting from the gross negligence or willful misconduct of County.

**3.06 Termination.** The assignment provided for in this Article III shall continue in full force and effect until all the Obligations have been fully paid and satisfied. At such time, this assignment and the authority and powers herein granted by Borrower to County shall cease and terminate.

**3.07 Attorney-in-Fact.** Borrower irrevocably constitutes and appoints County, and each of its officers and agents, as its true and lawful attorney-in-fact, with power of substitution, to undertake and sign any and all of the rights, powers, and



authorities described in this Article III with the same force and effect as if undertaken or performed by Borrower, and Borrower ratifies and confirms any and all such actions that may be taken or omitted to be taken by County, its employees, agents, and attorneys.

#### ARTICLE IV

##### Security Agreement and Fixture Filing

**4.01 Security.** To secure the Obligations, Borrower grants to County a security interest in the following: (1) the Trust Property to the extent the same is not encumbered by this Trust Deed as a first priority real estate lien, subordinate only to those liens previously approved by the County; (2) all personal property that is used or will be used in the construction of any Improvements on the Trust Property; (3) all personal property that is now or will be placed on or in the Trust Property or Improvements; (4) all personal property that is derived from or used in connection with the use, occupancy, or enjoyment of the Trust Property; (5) all property defined in the Uniform Commercial Code as adopted in the state of Oregon, as accounts, equipment, fixtures, and general intangibles, to the extent the same are used at, or arise in connection with the ownership, maintenance, or operation of, the Trust Property; (6) all causes of action, claims, security deposits, advance rental payments, utility deposits, refunds of fees or deposits paid to any governmental authority, refunds of taxes, and refunds of insurance premiums relating to the Trust Property; and (7) all present and future attachments, accessions, amendments, replacements, additions, products, and proceeds of every nature of the foregoing. This Trust Deed shall constitute a security agreement and "fixture filing" under the Uniform Commercial Code Secured Transactions statutes of the State of Oregon. The mailing address of Borrower and the address of County from which information may be obtained are set forth in the introductory paragraph of this Trust Deed.

#### ARTICLE V

##### Events of Default; Remedies

**5.01 Events of Default.** Each of the following shall constitute an event of default under the Loan Documents; provided that the party declaring a default has first provided to the other party thirty days written notice specifying the alleged default and giving such other party the opportunity to cure the alleged default during that 30-day period, or during such longer period as is agreed to. Any such written notice and opportunity to cure provided to the **Borrower** must be provided to Ikoï So Terrace GP, LLC, an Oregon limited liability company ("Managing Member"), the general partner of the Borrower, and Raymond James Tax Credit Fund XX L.L.C., a Delaware limited liability company ("Investor Member"), the limited partner of the Borrower. County agrees that any cure of any default made or tendered by Investor Member shall be deemed to be a cure by Borrower and shall be accepted or rejected on the same basis as if made or tendered by Borrower.

- 1) Nonpayment. Failure to pay any amount due under the Loan Documents, before the due date.
- 2) Failure of Owner to comply with the Affordability Requirements at any time during the Period of Affordability.
- 3) Breach of Other Covenants. Material failure to perform or abide by any other condition of the Loan Documents.
- 4) Misinformation. Falsity when made in any material respect of any representation, warranty, or information furnished in the Loan Documents or in the application for HOME funds.
- 5) Other Default. The occurrence of any other event of default under the Loan Documents.
- 6) Cross-Defaults. Owner's default, after expiration of any applicable notice and cure periods, under any other documents related to the Project, including but not limited to the documents which evidence the other sources of funds listed in the Loan Documents.
- 7) Bankruptcy. The occurrence of any of the following with respect to Owner or any guarantor of the Obligations: (a) appointment of a receiver, liquidator, or Title Company for any such party or any of its properties; (b) adjudication as a bankrupt or insolvent; (c) filing of any petition by or against any such party under any state or federal bankruptcy, reorganization, moratorium or insolvency law; (d) institution of any proceeding for dissolution or liquidation; (e) inability to pay debts when due; (f) any general assignment for the benefit of creditors; or (g) abandonment of the Trust Property.
- 8) Transfer; Due-on-Sale. Any sale, conveyance, contract for conveyance, transfer, assignment, encumbrance, pledge, or grant of a security interest in all or any part of the Property, or any interest therein, either voluntarily, involuntarily, or by the operation of law (a "Transfer"), without County's prior written consent, shall constitute an event of default. In the case of an LIHTC project, this section shall not apply to a transfer to an affiliate of the Managing Member or the Investor Member of the Borrower, to a successor or assignee of the Managing Member or the removal of any general partner of the Borrower by Investor Member for cause in accordance with Borrower's Amended and Restated Agreement of Limited Partnership Agreement. If a general partner of Borrower is so removed, County shall not unreasonably withhold its consent to the substitute general partner, provided that County's consent shall not be required if the Investor Member or an entity which is directly or indirectly owned and/or controlled by Raymond James Tax Credit Funds, Inc., is the substitute general partner.

**5.02 Remedies in Case of Default.** If an Event of Default shall occur, subject to the terms of Section 13 of the Loan Agreement, County or Title Company may exercise any one or more of the following rights and remedies, in addition to any other remedies that may be available by law, in equity, or otherwise:

- 1) **Extend Period of Affordability.** If Borrower fails to provide the required rents, fails to rent to eligible tenants, or fails to maintain the units according to applicable Property Standards, County may extend the Period of Affordability for the period during which such failure existed.
- 2) **Acceleration.** County may declare all or any portion of the Obligations immediately due and payable.
- 3) **Receiver.** County may have a receiver appointed for the Trust Property. County shall be entitled to the appointment of a receiver as a matter of right whether or not the apparent value of the Trust Property exceeds the amount of the indebtedness secured by this Trust Deed. Employment by Title Company or County shall not disqualify a person from serving as receiver. Borrower consents to the appointment of a receiver at County's option and waives any and all defenses to such an appointment.

- 4) **Possession.** County may, either through a receiver or as lender-in-possession, enter and take possession of all or any part of the Trust Property and use, operate, manage, and control it as County shall deem appropriate in its sole discretion. Upon request after an Event of Default, Borrower shall peacefully relinquish possession and control of the Trust Property to County or any receiver appointed under this Trust Deed.
- 5) **Rents.** County may revoke Borrower's right to collect the Rents and may, either itself or through a receiver, collect the same. County shall not be deemed to be in possession of the Property solely by reason of exercise of the rights contained in this subsection (5). If Rents are collected by County under this subsection(), Borrower irrevocably appoints County as Borrower's attorney-in-fact, with power of substitution, to endorse instruments received in payment thereof in the name of Borrower and to negotiate such instruments and collect their proceeds. After payment of all Obligations, any remaining amounts shall be paid to Borrower and this power shall terminate.
- 6) **Power of Sale.** County may direct Title Company, and Title Company shall be empowered, to foreclose the Property by advertisement and sale under applicable law.
- 7) **Foreclosure.** County may judicially foreclose this Trust Deed and obtain a judgment foreclosing Borrower's interest in all or any part of the Property.
- 8) **Fixtures and Personal Property.** With respect to any Improvements and other personal property subject to a security interest in favor of County, County may exercise any and all of the rights and remedies of a secured party under the Uniform Commercial Code.
- 9) **Abandonment.** County may abandon all or any portion of the Trust Property by written notice to Borrower.

**5.03 Sale.** In any sale under this Trust Deed or pursuant to any judgment, the Trust Property, to the extent permitted by law, may be sold as an entirety or in one or more parcels and in such order as County may elect, without regard to the right of Borrower, any person claiming under Borrower, or any guarantor or surety to the marshalling of assets. The purchaser at any such sale shall take title to the Trust Property or the part thereof so sold, free and clear of the estate of Borrower, the purchaser being discharged from all liability to see to the application of the purchase money. Any person, including County, its elected officials, officers, agents, and employees, may purchase at any such sale. County and each of its officers are irrevocably appointed Borrower's attorney-in-fact, with power of substitution, to make all appropriate transfers and deliveries of the Trust Property or any portions thereof so sold and, for that purpose, County and its officers may sign all appropriate instruments of transfer. Nevertheless, Borrower shall ratify and confirm, or cause to be ratified and confirmed, any such sale or sales by executing and delivering, or by causing to be signed and delivered, to County or to such purchaser or purchasers all such instruments as may be advisable, in the judgment of County, for such purpose.

**5.04 Cumulative Remedies.** All remedies under this Trust Deed are cumulative and not exclusive. Any election to pursue one remedy shall not preclude the exercise of any other remedy. An election by County to cure under Section 1.15 shall not constitute a waiver of the default or of any of the remedies provided in this Trust Deed. No delay or omission in exercising any right or remedy shall impair the full exercise of that or any other right or remedy or constitute a waiver of the default.

**5.05 Receiver or Trustee-in-Possession.** Upon taking possession of all or any part of the Trust Property, Title Company, County, or a receiver may:

- 1) **Management.** Use, operate, manage, control, and conduct business with the Trust Property and make expenditures for such purposes and for such maintenance and improvements as are deemed reasonably necessary.
- 2) **Rents and Revenues.** Collect all rents, revenues, income, issues, and profits from the Trust Property and apply such sums to the reasonable expenses of use, operation, management, maintenance, and improvements.
- 3) **Construction.** At its option, complete any construction in progress on the Property, and in that connection pay bills, borrow funds, employ contractors, and make any changes in plans and specifications as it deems appropriate.
- 4) **Additional Indebtedness.** If the revenues produced by the Trust Property are insufficient to pay expenses, County, Title Company, or the receiver may borrow or advance such sums upon such terms as it deems reasonably necessary for the purposes stated in this section. All advances shall bear interest, unless otherwise provided, at the rate set forth in the Note, and repayment of such sums shall be secured by this Trust Deed.

**5.06 Application of Proceeds.** All proceeds realized from the exercise of the rights and remedies under this Section 5 shall be applied as follows:

- 1) **Costs and Expenses.** To pay all costs of exercising such rights and remedies, including the costs of maintaining and preserving the Trust Property, the costs and expenses of any receiver or lender-in-possession, the costs of any sale, and the costs and expenses provided for in Section 6.07 below.
- 2) **Indebtedness.** To pay all Obligations, in such order as County shall determine in its sole discretion.
- 3) **Surplus.** The surplus, if any, remaining after satisfaction of all the Obligations shall be paid to the clerk of the court in the case of a judicial foreclosure proceeding, otherwise to the person or persons legally entitled to the surplus.

**5.07 Deficiency.** No sale or other disposition of all or any part of the Trust Property pursuant to this Section 5 shall be deemed to relieve Borrower of any of the Obligations, except to the extent that the proceeds are applied to the payment of such Obligations.

**5.08 Waiver of Stay, Extension, Moratorium, and Valuation Laws.** To the fullest extent permitted by law, Borrower waives the benefit of any existing or future stay, extension, or moratorium law that may affect observance or performance

of the provisions of this Trust Deed and any existing or future law providing for the valuation or appraisal of the Trust Property prior to any sale.

**5.09 Continued LIHTC obligations.** This Trust Deed shall to the extent provided below, be subordinate to such extended use agreements and/or land use restrictive covenants as may be recorded from time to time in favor of the State of Oregon acting by and through its Housing and Community Services Department with respect to the property. This subordination shall cease to be effective as of the earlier of (i) the date the property is acquired by foreclosure (or instrument in lieu of foreclosure), or (ii) upon the termination of the "extended use period," as defined in Section 42(h)(6)(D) of the Internal Revenue Code, as amended, or any successor provision (the "Code"), for such other reason provided in Section 42(h)(6)(E) of the Code. Provided, however, a limitation on the eviction of existing low-income tenants, for the term and to the extent provided in Section 42(h)(6)(E)(ii) of the Code, shall survive such foreclosure or other termination of the extended use period applicable to the property. This subordination shall be interpreted to constitute a subordination of this Trust Deed, but only to the extent, necessary to meet the requirements established under Section 42(h)(6)(B) of the Code.

## **ARTICLE VI General Provisions**

**6.01 Time is of the Essence.** Time is of the essence with respect to all covenants and obligations of Borrower under this Trust Deed.

**6.02 Reconveyance by Title Company.** At any time upon the request of County, payment of Title Company's fees, if any, and presentation of this Trust Deed, without affecting liability of any persons for the payment of the Obligations, Title Company may reconvey, without warranty, all or any part of the Trust Property. The grantee in any reconveyance may be described as the "person or persons legally entitled thereto," and the recitals therein of any facts shall be conclusive proof of the truthfulness thereof.

**6.03 Notice.** Except as otherwise provided in this Trust Deed, all notices pertaining to this Trust Deed shall be in writing and may be delivered by hand, or mailed by first class, registered, or certified mail, return-receipt requested, postage prepaid, and addressed to the appropriate party at its address set forth at the outset of this Trust Deed. Any party may change its address for such notices from time to time by notice to the other parties. Notices given by mail in accordance with this paragraph shall be deemed to have been given upon the date of mailing; notices given by hand shall be deemed to have been given when actually received. Any notice to Owner shall be accompanied by a notice to the Investor Member of Owner at \_\_\_\_\_

**6.04 Substitute Trustee.** In the event of dissolution or resignation of Title Company, County may substitute one or more trustees to sign the trust created, and the new trustee(s) shall succeed to all the powers and duties of the prior trustee(s).

**6.05 Trust Deed Binding on Successors and Assigns.** This Trust Deed shall be binding upon and inure to the benefit of the successors and assigns of Borrower, Title Company, and County. If the Trust Property or any portion thereof shall at any time be vested in any person other than Borrower, County shall have the right to deal with such successor regarding this Trust Deed, the Trust Property, and the Obligations in such manner as County deems appropriate in its sole discretion, without notice to or approval by Borrower and without impairing Borrower's liability for the Obligations.

**6.06 Indemnity.** Borrower shall hold County and Title Company and their respective elected officials, directors, officers, employees and agents, harmless from and indemnify them for any and all claims, demands, damages, liabilities, and expenses, arising out of or in connection with Title Company's or County's interest under this Trust Deed, except Borrower shall not be liable for acts performed by County or Title Company in violation of applicable law or resulting from the gross negligence or willful misconduct of County or Title Company.

**6.07 Expenses and Attorney Fees.** If County refers any of the Obligations to an attorney for collection or seeks legal advice following a default; if County is the prevailing party in any litigation instituted in connection with any of the Obligations; or if County or any other person initiates any judicial or nonjudicial action, suit, or proceeding in connection with any of the Obligations or the Trust Property (including but not limited to proceedings under federal bankruptcy law, eminent domain, under probate proceedings, or in connection with any state or federal tax lien), and an attorney is employed by County to (1) appear in any such action, suit, or proceeding, or (2) reclaim, seek relief from a judicial or statutory stay, sequester, protect, preserve, or enforce County's interests, then in any such event Borrower shall pay reasonable attorney fees, costs, and expenses incurred by County or its attorney in connection with the above-mentioned events or any appeals related to such events, including but not limited to costs incurred in searching records, the cost of title reports, and the cost of surveyors' reports. Such amounts shall be secured by this Trust Deed and, if not paid upon demand, shall bear interest at the rate specified in the Note.

**6.08 Applicable Law.** The Trust Deed and the validity, interpretation, performance, and enforcement of the Trust Deed shall be governed by the laws of the state of Oregon without giving effect to the conflict of law provisions thereof.

**6.09 Captions.** The captions to the sections and paragraphs of this Trust Deed are included only for the convenience of the parties and shall not have the effect of defining, diminishing, or enlarging the rights of the parties or affecting the construction or interpretation of any portion of this Trust Deed.

**6.10 Rights of Prior Mortgagee.** In the event that all or any portion of the Trust Property is subject to a superior mortgage or trust deed specifically permitted under Exhibit B, the rights of County with respect to insurance and condemnation proceeds as provided in Sections 1.14 and 2.01, and all other rights granted under this Trust Deed that have also been granted to such a superior mortgagee or trust deed, shall be subject to the rights of the superior mortgagee or trust deed beneficiary. Borrower authorizes all such superior mortgagees and beneficiaries, on satisfaction

of the indebtedness secured by their mortgage or trust deed, to remit all remaining insurance or Condemnation proceeds and all other sums held by them to County to be applied in accordance with this Trust Deed.

**6.11 Person Defined.** As used in this Trust Deed, the word person shall mean any natural person, partnership, trust, corporation, or other legal entity of any nature.

**6.12 Severability.** If any provision of this Trust Deed shall be held to be invalid, illegal, or unenforceable, such invalidity, illegality, or unenforceability shall not affect any other provisions of this Trust Deed, and such other provisions shall be construed as if the invalid, illegal, or unenforceable provision had never been contained in the Trust Deed.

**6.13 Entire Agreement.** This Trust Deed and the other Loan Documents contain the entire agreement of the parties with respect to the Trust Property. No prior agreement, statement, or promise made by any party to this Trust Deed that is not contained therein shall be binding or valid.

**6.14 Commercial Property.** Borrower covenants and warrants that the Property and Improvements are used by Borrower exclusively for business and commercial purposes. Borrower also covenants and warrants that the Property and Improvements are not now, and at no time in the future will be, occupied as the principal residence of Borrower, Borrower's spouse, or Borrower's minor or dependent child.

**6.15 Standard for Discretion**

In the event this Mortgage is silent on the standard for any consent, approval, determination, or similar discretionary action, the standard shall be sole and unfettered discretion as opposed to any standard of good faith, fairness, or reasonableness.

**6.16 ORS 93.040 Warning.** BEFORE SIGNING OR ACCEPTING THIS INSTRUMENT, THE PERSON TRANSFERRING FEE TITLE SHOULD INQUIRE ABOUT THE PERSON'S RIGHTS, IF ANY, UNDER ORS 195.300, 195.301 AND 195.305 TO 195.336 AND SECTIONS 5 TO 11, CHAPTER 424, OREGON LAWS 2007, SECTIONS 2 TO 9 AND 17, CHAPTER 855, OREGON LAWS 2009, AND SECTIONS 2 TO 7, CHAPTER 8, OREGON LAWS 2010. THIS INSTRUMENT DOES NOT ALLOW USE OF THE PROPERTY DESCRIBED IN THIS INSTRUMENT IN VIOLATION OF APPLICABLE LAND USE LAWS AND REGULATIONS. BEFORE SIGNING OR ACCEPTING THIS INSTRUMENT, THE PERSON ACQUIRING FEE TITLE TO THE PROPERTY SHOULD CHECK WITH THE APPROPRIATE CITY OR COUNTY PLANNING DEPARTMENT TO VERIFY THAT THE UNIT OF LAND BEING TRANSFERRED IS A LAWFULLY ESTABLISHED LOT OR PARCEL, AS DEFINED IN ORS 92.010 OR 215.010, TO VERIFY THE APPROVED USES OF THE LOT OR PARCEL, TO DETERMINE ANY LIMITS ON LAWSUITS AGAINST FARMING OR FOREST PRACTICES, AS DEFINED IN ORS 30.930, AND TO INQUIRE ABOUT THE RIGHTS OF NEIGHBORING PROPERTY OWNERS, IF ANY, UNDER ORS 195.300, 195.301 AND 195.305 TO 195.336 AND SECTIONS 5 TO 11, CHAPTER 424, OREGON LAWS 2007, SECTIONS 2 TO 9 AND 17, CHAPTER 855, OREGON LAWS 2009, AND SECTIONS 2 TO 7, CHAPTER 8, OREGON LAWS 2010.

Dated: \_\_\_\_\_, 2017

BORROWER: Rosewood Terrace Limited Partnership

By: \_\_\_\_\_, its General Partner

By: \_\_\_\_\_, its Managing Member

By: \_\_\_\_\_, its Executive Director

\_\_\_\_\_  
(Signature)

STATE OF OREGON )

County of \_\_\_\_\_) ss.

On \_\_\_\_\_, 2017, before me personally appeared \_\_\_\_\_, who being duly sworn, stated that she is the Executive Director \_\_\_\_\_, the Managing Member Rosewood Terrace, and acknowledged the foregoing instrument to be the voluntary act and deed of the Borrower, signed by authority of Borrower.

\_\_\_\_\_  
Notary Public for Oregon  
My commission expires: \_\_\_\_\_

**EXHIBIT A**  
**LEGAL DESCRIPTION**

Insert Legal Description here

**EXHIBIT B**

**EXCEPTIONS TO CLEAR TITLE**

Insert any Exceptions here

## PROMISSORY NOTE

### CLACKAMAS COUNTY HOME PROGRAM

Name of Project: Rosewood Terrace Apartments

**\$900,000.00** \_\_\_\_\_, **2017**

For value received, \_\_\_\_\_, ("Borrower"), promises to pay to the order of Clackamas County ("Lender"), the sum of **Nine Hundred Thousand and No/100 Dollars (\$900,000.00)**, or so much thereof as may be advanced, together with interest thereon at the rate of **zero percent (0.0 %) per year, compounded annually**. The loan is evidenced by this Promissory Note the ("Note"), a Loan Agreement, as amended, a Trust Deed, and a Declaration of Land Use Restrictive Covenants (together, the "Loan Documents"). Unless otherwise defined herein, capitalized terms have the meaning assigned to them in the Loan Agreement, as amended.

This Note is subject to the terms of the Loan Agreement and the following terms and conditions. To the extent there may be a conflict between the terms of this Note and the Loan Agreement, the terms of the Loan Agreement shall control:

1. **Payment of Obligation**. Lender makes this loan for the development and construction of the Rosewood Terrace Apartments (the "Project"), under Title II, Section 216 and 217 of the National Affordable Housing Act of 1990, and 24 CFR Part 92 (the "HOME" program).
  - a. The loan shall bear interest at a rate of **zero percent (0.0 %) per year, compounded annually**.
  - b. The term of the loan is 30 years.
  - c. The Maturity Date is 30 years from the date on this Note shown above.
  - d. The loan shall begin to accrue interest on the Project Completion Date.
  - e. The loan shall be repaid in full upon the earlier of the Maturity Date, the sale, assignment or other transfer of title to the Property without Lender's consent, or the date Owner or its agents or subcontractors is otherwise in default under any of the Loan Documents.
  - f. Payments shall be made at such place as Lender may designate in writing.
  - g. Payments of principal and interest shall be made until the loan is paid in full. All payments on the loan shall be applied first to the interest due on the loan and then the remaining amount shall be applied to the principal.
  - h. The Borrower will make cash flow dependent payments per its Amended and Restated Limited Partnership Agreement.
  - i. Each payment shall be due on or before June 30th of the year following the calendar year to which the payment relates and shall be based on the computation of Net Cash Flow based on an audited financial statement of Borrower. The first payment shall be due on or before June 30 of the year following the Project Completion Date.
  - j. No late fees will be charged, but interest shall continue to accrue.
2. **Governing Law**. This Note shall be governed by and construed in accordance with the laws of Oregon without giving effect to the conflict of law provisions thereof.
3. **Security**. This Note shall be secured by a trust deed from Borrower as grantor to Lender as beneficiary in the Project.
4. **Nonrecourse Obligation**. This Note and the obligations contained herein are without recourse to Borrower. The sole recourse of Lender with respect to Borrower's obligations shall be to exercise its rights under the deed of trust with respect to the Project and/or enforce the terms of the Loan Documents signed by Borrower in favor of Lender.

If the undersigned is a corporation, it has caused its name to be signed and its seal, if any, affixed by an officer or other person duly authorized to do so by order of its board of directors.

Dated \_\_\_\_\_, 2017

BORROWER:

By: \_\_\_\_\_, its General Partner  
By: \_\_\_\_\_, its Managing Member  
By: \_\_\_\_\_, its Executive Director

\_\_\_\_\_  
(Signature)

STATE OF OREGON )

County of \_\_\_\_\_) ss.

On \_\_\_\_\_, 2017, before me personally appeared \_\_\_\_\_,  
who being duly sworn, stated that he/she is the \_\_\_\_\_  
of \_\_\_\_\_ and acknowledged the  
foregoing instrument to be the voluntary act and deed of the Borrower, signed by authority of  
Borrower.

\_\_\_\_\_  
Notary Public for Oregon  
My commission expires: \_\_\_\_\_



AFTER RECORDING RETURN TO:  
Clackamas County Community Development Division  
2051 Kaen Road  
Oregon City, OR 97045

STATUTORY NOTICE:  
The name and address of the entity holding a lien or other interest created by this instrument are set forth below, and the tax account number of the property subject to the lien or in which the interest is created is: Clackamas County Community Development Division

Legal Description – Exhibit "A" Attached

**DECLARATION OF LAND USE RESTRICTIVE COVENANTS**

**CLACKAMAS COUNTY HOME PROGRAM**

**Name of Project: Rosewood Terrace Apartments**

THIS DECLARATION OF LAND USE RESTRICTIVE COVENANTS ("**Declaration**") dated \_\_\_\_\_, 2017 by \_\_\_\_\_ and its successors and assigns ("**Owner**") is given as a condition precedent to the award of HOME Investment Partnership ("**HOME**") Program funds by Clackamas County, a political subdivision of the State of Oregon ("**County**") together with any successor to its rights, duties, and obligations.

Owner is the owner of the Rosewood Terrace Apartments, a new-construction 212-unit affordable rental housing apartment complex located at \_\_\_\_\_ ("**Project**"). The Legal Description of the property on which the Project is located is attached as Exhibit A (the "**Property**")

Owner has applied to the County and entered into HOME Loan Agreements (plurally referred to as "**Agreement**") for an award to the Project in amounts not to exceed **\$900,000.00**. Pursuant to the terms of the Agreement, Owner has represented to the County restrictions regarding rents and tenant eligibility that Owner will maintain for the Period of Affordability specified in the Agreement. County has entered into agreements with Owner pursuant to which Owner assumes all responsibilities of the Project pursuant to the Agreement. This Declaration is subject to the terms and conditions of the Loan Agreement.

In consideration of the promises and covenants set forth below and of other valuable consideration, the receipt and sufficiency of which is acknowledged, the Owner and the County agree as follows:

**SECTION 1 - DEFINITIONS**

All the words and phrases used in this Declaration shall have the same meaning as when used in the Agreement and in 24 CFR 92 ("**HUD HOME Regulations**") unless the context requires otherwise.

**SECTION 2 - RECORDING AND FILING; COVENANTS TO RUN WITH THE LAND**

- (A) Promptly after this Declaration is signed by Owner and County, Owner shall record this Declaration and all amendments and file in the official public land deed records of Clackamas County, and shall pay all fees and charges incurred in connection therewith. Upon recording, the Owner shall immediately transmit to the County a signed original or certified copy of the recorded Declaration showing the date, deed book and page numbers of record.
- (B) The Owner intends, declares, and covenants, on behalf of itself and all future Owners and operators of the Project during the term of this Declaration, that this Declaration, and the covenants and restrictions set forth in this Declaration regulating and restricting the use, occupancy and transfer of the Project: (1) shall be and are covenants running with the Project land, encumbering the Project for the term of this Declaration, binding upon the Owner's successors in title and all subsequent Owners and Operators of the Project; (2) are not merely personal covenants of the Owner; and (3) shall bind the Owner (and the benefits shall inure to the County and any past, present or prospective tenant of the Project) and its respective successors and assigns during the term of this Declaration. The Owner agrees that any and all requirements of the laws of the State of Oregon to be satisfied in order for the provisions of this Declaration to constitute deed restrictions and covenants running with the land shall be deemed to be satisfied in full, and that any requirements of privileges of estate are intended to be satisfied, or in the alternate, that an equitable servitude has been created to insure that these restrictions run with the Project. For the term of this Declaration, each and every contract, deed or other instrument hereafter signed conveying the Project or portion thereof shall expressly provide that such conveyance is subject to this Declaration, provided, however, the covenants contained herein shall survive

and be effective regardless of whether such contract, deed, or other instrument hereafter signed conveying the Project or portion thereof provides that such conveyance is subject to this Declaration.

- (C) The Owner covenants to obtain the consent of any prior recorded lienholder on the Project to this Declaration.

### **SECTION 3 - REPRESENTATIONS, COVENANTS AND WARRANTIES OF THE OWNER**

**The Owner represents, covenants, and warrants as follows:**

- (A) The Owner (1) is qualified to transact business under the laws of the State of Oregon, (2) has the power and authority to own its properties and assets and to carry on its business as now being conducted, and (3) has the full legal right, power and authority to sign and deliver this Declaration.
- (B) The execution and performance of this Declaration by the Owner (1) will not violate or, as applicable, has not violated any provision of law, rule or regulation, or any order of any court or other agency or governmental body, (2) will not violate or, as applicable, has not violated any provision of any indenture, agreement, mortgage, mortgage note, or other instrument to which the Owner is a party or by which it or the Project is bound, and (3) will not result in the creation or imposition of any prohibited encumbrance of any nature.
- (C) The Owner will, at the time of execution and delivery of this Declaration, have good and marketable title to the Property free and clear of any lien or encumbrance (subject to encumbrances created pursuant to this Declaration, any Loan Documents relating to the Project or other permitted encumbrances).
- (D) There is no action, suit, or proceeding at law or in equity, or by or before any governmental instrumentality or other agency now pending, or, to the knowledge of the Owner, threatened against or affecting it, or any of its properties or rights, which if adversely determined, would materially impair its right to carry on business substantially as now conducted (and as now contemplated by this Declaration) or would materially adversely affect its financial condition.
- (E) The Project constitutes or will constitute a qualified low-income building or qualified low-income project, as applicable, as defined in 24 CFR Part 92 and applicable regulations.
- (F) **Five units in the Project are HOME-Assisted Units.**

During the term of this Declaration:

- All of the HOME-Assisted Units must be leased, rented or made available to members of the general public whose incomes are less than or equal to 50% of the median income.
- Rents for the HOME-Assisted Units will not exceed the gross rent allowable under 24 CFR 92.252(b)(1) except that, in accordance with 24 CFR 92.252(b)(2), "If the unit receives Federal or State project-based rental subsidy and the very low-income family pays as a contribution toward the rent not more than 30 percent of the family's adjusted income, then the maximum rent (i.e. tenant contribution plus project-based rental subsidy) is the rent allowable under the Federal or State project-based rental subsidy program."

The determination of whether a tenant meets the income requirement shall be made by the Owner or its designated agent at least annually in accordance with 24 CFR 92.252(h).

- (G) During the term of this Declaration, Owner will maintain the Project and each HOME-Assisted unit in accordance with the Property Standards requirements of 24 CFR 92.251.
- (H) Subject to the requirements of 24 CFR Part 92 and this Declaration, the Owner may sell, transfer or exchange the entire Project at any time, but the Owner shall notify in writing and obtain the prior agreement of any buyer or successor or other person acquiring the Project or any interest therein that such acquisition is subject to the requirements of this Declaration and to the requirements of 24 CFR Part 92 and applicable regulations. This provision shall not act to waive any other restriction on sale, transfer, or exchange of the Project or any low-income portion of the Project. The Owner agrees that the County may void any sale, transfer, or exchange of the Project if the buyer or successor or other person fails to assume in writing the requirements of this Declaration and the requirements of 24 CFR Part 92.

Notwithstanding any other provisions herein, the sale, transfer, assignment or exchange of all or a portion of the interest of \_\_\_\_\_ (the "Investor Partner"), in Owner shall not require the County's consent and shall not constitute a sale, transfer or assignment for purposes of this Agreement.

In addition, the withdrawal, or removal of the Managing Member of the Owner for cause pursuant to the terms of the Owner's Amended and Restated Agreement of Limited Partnership shall not constitute a default hereunder or under the Agreement, provided that the substitute Managing Member is reasonably acceptable to the County and is admitted to Owner within ninety days thereafter.

- (I) The Owner will notify the County in writing prior to any sale, transfer, or exchange of the entire Project or any low-income portion of the Project.
- (J) The Owner shall not demolish any part of the Project, substantially subtract from any real or personal property of the Project, or permit the use of any residential rental unit for any purpose other than rental housing during the term of this Declaration unless required by law or unless the County has given its prior written consent.
- (K) The Owner represents, warrants, and agrees that if the Project, or any part thereof, shall be damaged, destroyed, shall be condemned, or acquired for public use, the Owner will use its best efforts, subject to the rights of any mortgagee, to repair and restore the Project to substantially the same condition as existed prior

to the event causing such damage or destruction, or to relieve the condemnation, and thereafter to operate the Project in accordance with the terms of this Declaration.

- (L) The Owner warrants that it has not and will not sign any other Declaration with provisions contradictory to, or in opposition to, the provisions hereof, and that in any event, the requirements of this Declaration are paramount and controlling as to the rights and obligations herein set forth and supersede any other requirements in conflict herewith.

#### **SECTION 4 - TERM OF DECLARATION**

- (A) This Declaration, and the Terms of Affordability specified herein, applies to the Project immediately upon recordation, and the Owner shall comply with all restrictive covenants herein not later than the first day in the Project period on which any building which is part of the Project is placed in service. This Declaration shall terminate on the later of 20 years after the Project Completion Date or the date on which the loan is paid in full.
- (B) Pursuant to 24 CFR 92.252(e), as amended, this Declaration and the Terms of Affordability shall remain in effect for not less than the period described in section (A) above without regard to the term of the mortgage of other underlying security and without regard to any transfer of ownership; provided however, that the requirements herein, shall be terminated upon foreclosure or transfer in lieu of foreclosure, but shall be revived according to the original terms if during the original term, the owner of record before the foreclosure or deed in lieu of foreclosure, or any entity that includes the former owner or those with whom the former owner has or had family or business ties, obtains an ownership interest in the project or property.

#### **SECTION 5 – COUNTY’S RIGHT TO INSPECT; OWNER’S OBLIGATION TO REPORT**

- (A) The Owner shall permit, during normal business hours and upon reasonable notice, any duly authorized representative of the County, to inspect any books and records of the Owner regarding the Project with respect to the incomes of Low-Income tenants which pertain to compliance with the County's Occupancy Restrictions specified in this Declaration.
- (B) The Owner shall submit any other information, documents, or certifications requested by the County which the County shall deem reasonably necessary to substantiate the Owner's continuing compliance with the provisions of the County's Occupancy Restrictions specified in this Declaration.

#### **SECTION 6 - ENFORCEMENT OF 24 CFR 92 AFFORDABLE HOUSING AND INCOME TARGETING REQUIREMENTS**

- (A) The Owner covenants that it will not knowingly take or permit any action that would result in a violation of the requirements of 24 CFR Part 92 and applicable regulations of this Declaration. Moreover, Owner covenants to take any lawful action (including amendment of this Declaration as may be necessary, in the opinion of the County) to comply fully with all applicable rules, rulings, policies, procedures, regulations or other official statements promulgated or proposed and published by HUD from time to time pertaining to Owner's obligations under 24 CFR Part 92 and affecting the Project.
- (B) The Owner acknowledges that the primary purpose for requiring compliance by the Owner with restrictions provided in this Declaration is to assure compliance of the Project and the Owner with 24 CFR 92 and the applicable regulations, AND BY REASON THEREOF, THE OWNER, IN CONSIDERATION FOR RECEIVING HOME INVESTMENT PARTNERSHIPS PROGRAM FUNDS FOR THIS PROJECT, AGREES AND CONSENTS THAT THE COUNTY AND ANY TENANT WHO MEETS THE INCOME LIMITATION APPLICABLE UNDER 24 CFR 92 (WHETHER PROSPECTIVE, PRESENT OR FORMER OCCUPANT) SHALL BE ENTITLED, FOR ANY BREACH OF THE PROVISIONS HEREOF, AND IN ADDITION TO ALL OTHER REMEDIES PROVIDED BY LAW OR IN EQUITY, TO ENFORCE SPECIFIC PERFORMANCE BY THE OWNER OF ITS OBLIGATIONS UNDER THIS DECLARATION IN A STATE COURT OF COMPETENT JURISDICTION. The Owner further specifically acknowledges that the beneficiaries of the Owner's obligations hereunder cannot be adequately compensated by monetary damages in the event of any default hereunder.
- (C) The Owner agrees that the representations and covenants set forth herein may be relied upon by the County and all persons interested in Project compliance under 24 CFR Part 92 and the applicable regulations.
- (D) The Owner agrees to take any and all actions reasonably required by the County to substantiate the Owner's compliance with occupancy restrictions of 24 CFR Part 92 as now constituted or subsequently amended and other occupancy restrictions of the County as now constituted or subsequently adopted.
- (E) This Declaration and the Agreement of which it is a part may be enforced by the County or its designee in the event the Owner fails to satisfy any of the requirements herein. In addition, this Declaration shall be deemed a contract enforceable by one or more Tenants as third-party beneficiaries of the Declaration and Agreement. In the event the Owner fails to satisfy the requirements of this Declaration or the Agreement and legal costs are incurred by the County or one or more of the tenants or beneficiaries, such legal costs, including reasonable attorney fees and court costs (including costs of appeal), are the responsibility of, and may be recovered from, the Owner.



**EXHIBIT A  
LEGAL DESCRIPTION OF PROPERTY**

Insert Legal Description here



**GEORGE MARLTON, JD**  
PROCUREMENT DIVISION DIRECTOR

**PROCUREMENT DIVISION**  
**PUBLIC SERVICES BUILDING**  
2051 KAEN ROAD | OREGON CITY, OR 97045

Board of County Commissioners  
Clackamas County

Members of the Board:

**Approval of Contracts with Various Suppliers for  
Aggregate Rock Price Contracts for the Clackamas County Road Department**

<b>Purpose / Outcome</b>	Approval of five contracts for aggregate rock material for the Clackamas County Road Department, and grant signing authority to the Dept. of Transportation & Development Director. Contracts will serve as price agreements through 2020 for material and will be unencumbered.
<b>Dollar Amount and Fiscal Impact</b>	\$75,000.00 annual, \$225,000.00 total Contract value. Vendors may update pricing two (2) times per year at designated times.
<b>Funding Source</b>	215-7433 – Road Fund
<b>Duration</b>	October 31, 2020.
<b>Previous Board Action/Review</b>	n/a
<b>Strategic Plan Alignment</b>	Build a strong Infrastructure Build public trust through good government
<b>Contact Person</b>	Randy Harmon, Transportation Operations Manager, 503-650-3246

**Background:**

Transportation Maintenance has historically used multiple vendors for their aggregate rock needs. Last year they spent \$54,621.26 on aggregate rock. In an effort to remain transparent and compliant, the Procurement Division issued a Request for Quotes (RFQ) to obtain pricing that the vendors will be held to for three (3) years. The vendors will have the opportunity to adjust their prices twice a year during the open periods of April and October.

The Transportation Operations Manager, Randall Harmon, has recommended we contract with all vendors who replied to the RFQ. This will result in 5 contracts for aggregate rock. Contracts will be unencumbered and material will be purchased through a field purchase order or employee p-card. Vendors for this project will include:

- **Tigard Sand and Gravel**
- **Knife River Corporation**
- **Baker Rock**
- **Jim Turin & Sons**
- **Graves Quarry**

These contracts have been reviewed and approved by County Counsel.

**Recommendation:**

Staff recommends the Board of County Commissioners approve the Contracts and authorize the Transportation & Development Director to sign the Contracts on behalf of the County.

Sincerely

Ryan Rice  
Clackamas County Procurement

Placed on the Board Agenda of **April 6, 2017** by the Procurement Division.



April 5, 2017

Board of County Commissioners  
Clackamas County

Members of the Board:

Approval of Renewal of Contract for  
On-Call Strategic Communications with Envirolssues, Inc.

<b>Purpose/Outcome</b>	Approval of renewal of one-year contract.
<b>Dollar Amount and Fiscal Impact</b>	\$75,000.00 for FY 2017-2018 Total contract amount from FY 2014-2015 through FY 2017-2018 will be \$250,000.00.
<b>Funding Source</b>	Funds are budgeted in PGA's FY 2017-2018 budget line: 100-0152-00-43100
<b>Duration</b>	Effective July 1, 2017 through June 30, 2018
<b>Previous Board Action/Review</b>	N/A
<b>Strategic Plan Alignment</b>	Building trust through good government.
<b>Contact Person</b>	Gary Schmidt, Public and Government Affairs, 503-742-5908
<b>Contract No.</b>	N/A

**BACKGROUND:**

Public and Government Affairs issued an RFP for on-call strategic communications services in the fall of 2014 and selected Envirolssues as the vendor. The original contract with Envirolssues was signed on November 14, 2014 and continued through June 30, 2015 with a maximum annual compensation authorized not to exceed \$25,000.00. The contract included an option for three (3) one (1) year renewals.

On June 24, 2015, the contract was renewed for its first one (1) additional year from July 1, 2015 through June 30, 2016 with a maximum annual compensation authorized not to exceed \$25,000.00. On October 12, 2015, the contract was amended to increase the compensation by 50,000.00 with the maximum annual compensation authorized not to exceed \$75,000.00. On June 21, 2016 the contract was renewed for its second one (1) additional year from July 1, 2016 through June 30, 2017 with a maximum annual compensation authorized not to exceed \$75,000.00. This is the third and final request for a one (1) additional year with a maximum annual compensation authorized not to exceed \$75,000.00.

The scope of services will remain the same as described in the original agreement. This renewal, if approved, will become part of the contract documents, superseding the original to the applicable extent indicated.



Page 2  
Staff Report – EnviroIssues Contract Renewal  
April 5, 2017

This contract renewal has been reviewed and approved by County Counsel.

**RECOMMENDATION:**

Staff respectfully recommends the Board approve the amendment to renew the contract with EnviroIssues for On-Call Strategic Communication Services.

Respectfully submitted,

Gary Schmidt, Director  
Public and Government Affairs

**AMENDMENT #2 / RENEWAL #3**

**TO THE CONTRACT DOCUMENTS WITH ENVIROISSUES, INC. FOR ON-CALL STRATEGIC COMMUNICATION SERVICES**

This Amendment #2 / Renewal #3 is entered into between Enviroissues, Inc. (“Contractor”) and Clackamas County (“County”) and shall become part of the Contract documents entered into between both parties on November 24, 2014.

The Purpose of this Amendment #2 / Renewal #3 is to make the following changes to the Contract:

1. Section 1. **SCOPE:** is hereby changed as follows:  
The Contract termination date is hereby changed from June 30, 2017 to **June 30, 2018**. This Amendment is exercising the option to renew the final one (1) year term available on this Contract. The maximum annual compensation shall not exceed \$75,000, and the maximum Contract value shall not exceed \$250,000.00.

ORIGINAL CONTRACT AMOUNT	\$ 25,000.00
RENEWAL #1	\$ 25,000.00
AMENDMENT #1	\$ 50,000.00
RENEWAL #2	\$ 75,000.00
<b>AMENDMENT #2 / RENEWAL #3</b>	<b>\$ 75,000.00</b>
<b>TOTAL CONTRACT AMOUNT</b>	<b>\$ 250,000.00</b>

2. Section VI. **TERMINATION - AMENDMENT Item A** is hereby deleted in its entirety and replaced with:

**VI. TERMINATION – AMENDMENT**

A. **TERMINATIONS.** This Contract may be terminated for the following reasons: 1) This Contract may be terminated at any time by mutual consent of the parties, or by County for convenience upon thirty (30) days’ written notice to the Contractor; 2) County may terminate this Contract effective upon delivery of notice to Contractor, or at such later date as may be established by the County, if (i) federal or state laws, rules, regulations, or guidelines are modified, changed, or interpreted in such a way that either the work under this Contract is prohibited or County is prohibited from paying for such work from the planned funding source; or (ii) any license or certificate required by law or regulation to be held by the Contractor to provide the services required by this Contract is for any reason denied, revoked, or not renewed; 3) This Contract may also be immediately terminated by County for default (including breach of Contract) if (i) Contractor fails to provide services or materials called for by this Contract within the time specified herein or any extension thereof; or (ii) Contractor fails to perform any of the other provisions of this Contract or so fails to pursue the work as to endanger performance of this Contract in accordance with its terms, and after receipt of notice from County, fails to correct such failure within ten (10) business days; 4) If sufficient funds are not provided in future approved budgets of County (or from applicable federal, state, or other sources) to permit County in the exercise of its reasonable administrative discretion to continue this Contract, or if the program for which this Contract was executed is abolished, County may terminate this Contract without further liability by giving Contractor not less than thirty (30) days’ notice.

3. ADD A NEW SECTION:  
SECTION VII. LAWS, REGULATIONS AND ORDERS, AND TAX LAW COVENANT

**Section VII – LAWS, REGULATIONS AND ORDERS, AND TAX LAW COVENANT**

**A.** The Contractor at all times shall observe and comply with all federal and state laws and lawful regulations issued there under and local bylaws, ordinances, regulations and codes which in any manner affect the activities of the Contractor under this Contract, and further shall observe and comply with all orders or decrees as exist at present and those which may be enacted later by bodies or tribunals having any jurisdiction or authority over such activities of the Contractor.

**B.** The Contractor must, throughout the duration of this Contract and any extensions, comply with all tax laws of this state and all applicable tax laws of any political subdivision of this state. Any violation of this section shall constitute a material breach of this Contract. Any violation shall entitle the County to terminate this Contract, to pursue and recover any and all damages that arise from the breach and the termination of this Contract, and to pursue any or all of the remedies available under this Contract, at law, or in equity, including but not limited to:

1. Termination of this Contract, in whole or in part;
2. Exercise of the right of setoff, and withholding of amounts otherwise due and owing to the Contractor, in an amount equal to the County's setoff right, without penalty; and
3. Initiation of an action of proceeding for damages, specific performance, declaratory or injunctive relief. The County shall be entitled to recover any and all damages suffered as the result of the Contractor's breach of this Contract, including but not limited to direct, indirect, incidental and consequential damages, costs of cure, and costs incurred in securing replacement performance.

These remedies are cumulative to the extent the remedies are not inconsistent, and the County may pursue any remedy or remedies singly, collectively, successively, or in any order whatsoever.

**C.** The Contractor represents and warrants that, for a period of no fewer than six calendar years preceding the effective date of this Contract, has faithfully complied with:

1. All tax laws of this state, including but not limited to ORS 305.620 and ORS Chapters 316,317, and 318;
2. Any tax provisions imposed by a political subdivision of this state that applied to the Contractor, to the Contractor's property, operations, receipts, or income, or to the Contractor's performance of or compensation for any work performed by the Contractor;
3. Any tax provisions imposed by a political subdivision of this state that applied to the Contractor, or to goods, services, or property, whether tangible or intangible, provided by the Contractor; and
4. Any rules, regulations, charter provisions, or ordinances that implemented or enforced any of the foregoing tax laws or provisions.

4. ADD Section VIII. EXECUTION AND COUNTERPARTS:

**VIII. EXECUTION AND COUNTERPARTS:**

This Contract may be executed in several counterparts, each of which shall be an original, all of which shall constitute but one and the same instrument.

Except as expressly amended above, all other terms and conditions of the Contract shall remain in full force and effect.

By signature below, the parties agree to this Amendment #2 / Renewal #3, effective upon the date of the last signature below.

Enviroissues, Inc.  
1515 SW 5<sup>th</sup> Ave, Suite 1022  
Portland, OR 97201

Clackamas County Board of County  
Commissioners by:

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Chair

\_\_\_\_\_  
Name / Title (Printed)

\_\_\_\_\_  
Recording Secretary

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

\_\_\_\_\_  
Telephone Number / Fax Number

\_\_\_\_\_  
340348-92  
\*Oregon Business Registry Number

APPROVED AS TO FORM

\_\_\_\_\_  
FBC Washington  
Entity Type / State of Formation

\_\_\_\_\_  
County Counsel



**NORTH CLACKAMAS  
PARKS & RECREATION DISTRICT**

Administration

Scott Archer, Director  
North Clackamas Parks and Recreation District  
150 Beaver Creek Road  
Oregon City, OR 97045

April 6, 2017

Board of County Commissioners  
Clackamas County  
Board of North Clackamas Parks and Recreation District

Members of the Board:

Approval of an Intergovernmental Agreement between North Clackamas Parks & Recreation District (NCPRD) and the City of Milwaukie (City) to formalize roles and responsibilities for development of Wichita Park located in the City of Milwaukie.

<b>Purpose/Outcomes</b>	This Intergovernmental Agreement governs the roles, responsibilities and requirements for NCPRD and the City for grant administration, design and engineering, and construction of Wichita Park.
<b>Dollar Amount and Fiscal Impact</b>	\$14,200 for annual maintenance, after the park is constructed.
<b>Funding Source</b>	\$ 10,000 Linwood Neighborhood Association \$ 91,303 SDCs, Zone 1 \$158,697 NCPRD General Fund <u>\$265,000</u> State of Oregon Land and Water Conservation Fund Grant \$510,000 Total
<b>Duration</b>	This agreement will terminate on October 31, 2018 unless extended.
<b>Previous Board Action</b>	Resolution to apply for grant on 2-25-2016 Approved Grant Agreement on 11-23-2016
<b>Strategic Plan Alignment</b>	This action aligns with the following Board strategic priorities: <ul style="list-style-type: none"> <li>• Build public trust through good government – Developing and maintaining partnerships with other government agencies</li> <li>• Build a strong infrastructure – Working together with City of Milwaukie to plan, engineer and construct a new neighborhood park.</li> <li>• Ensure safe, healthy and secure communities – Development of a new neighborhood park in the Linwood Neighborhood of Milwaukie</li> </ul>
<b>Contact Person</b>	Scott Archer, <i>NCPRD Director</i> , 503-742-4421 Kathryn Krygier, <i>Planning &amp; Development Manager</i> , 503-742-4358

**BACKGROUND:**

The North Clackamas Parks and Recreation District (“NCPRD”) requests the approval of an Intergovernmental Agreement with the City of Milwaukie which formalizes the roles and responsibilities for the development of Wichita Park, a one-acre undeveloped site located at 5908 S.E. Monroe Street in the Linwood neighborhood.

In 1999, a Master Plan of the Wichita Park site was completed and adopted in the City’s Comprehensive Plan. In 2015, the Master Plan was updated and 30% construction documents were completed to determine a project budget and seek project funding.

The NCPRD Board of Directors identified neighborhood park improvements for Wichita Park as a high priority project in the NCPRD 2007 Parks and Recreation System Development Charges (SDC) Update Methodology Report and Capital Improvement Plan (CIP) and NCPRD 2015 Revised Draft Master Plan and CIP.

Now, funding has been secured and NCPRD staff is ready to complete design, engineering, and construction. Staff will work closely with the City of Milwaukie as outlined in the IGA and the Linwood Neighborhood District Association, who have contributed \$10,000 to this project.

**RECOMMENDATION:**

Staff respectfully recommends that the Board of County Commissioners, acting as the Governing Body of the North Clackamas Parks and Recreation District, approve and sign the attached IGA with the City of Milwaukie whereby grant administration, planning, engineering and construction of Wichita Park may begin as outlined in the agreement.

**ATTACHMENT:**

1. Agreement between the North Clackamas Parks and Recreation District and City of Milwaukie for Grant Administration, Planning, Engineering and Construction of Wichita Park

Respectfully submitted,

A handwritten signature in blue ink, appearing to read "Scott Archer", with a stylized flourish extending to the right.

Scott Archer, Director  
North Clackamas Parks and Recreation District

**AGREEMENT BETWEEN  
CITY OF MILWAUKIE  
AND  
NORTH CLACKAMAS PARKS AND RECREATION DISTRICT FOR  
GRANT ADMINISTRATION, PLANNING, ENGINEERING, AND  
CONSTRUCTION OF WICHITA PARK**

**I. Purpose**

- A. This Agreement regarding Wichita Park (this “Agreement”) is entered into between the City of Milwaukie (“City”), a municipal corporation, and North Clackamas Parks and Recreation District (“District”), a county service district formed under ORS Chapter 451.,
- B. This Agreement establishes roles and responsibilities between the City and District for grant administration, funding, planning, engineering, and construction of Wichita Park, which is owned by the City and is intended to be operated and maintained by the District.

**II. State of Oregon Parks and Recreation Department Grant Number: OP 2531 and NPS Grant Number: 41-01595 Responsibilities**

- A. District and City agree to the following responsibilities under this Agreement:
  - 1. Grant Performance. The District shall have primary responsibility for performance and completion of the Project, as it is described in State of Oregon Parks and Recreation Department Grant Number: OP 2531 and NPS Grant Number: 41-01595 attached hereto as Exhibit A (the “Grant”). This includes, but is not limited to, project design, contractor selection and procurement, project management, compliance with all applicable laws and regulations, and payment pursuant to the Grant. The District’s responsibilities are further described in Section III below.
  - 2. Grant Administration. The District shall administer and comply with all conditions and requirements set forth by the Grant. This includes, but is not limited to, requests for reimbursement, progress reports, final reports, inspection reports, completed site plan, project boundary map, project appraisals, digital images of the completed project, and representations and warranties. The District shall send copies of all grant deliverables and correspondence to the City.

3. Recovery of Funds. Any funds disbursed to the District under the Grant that are expended in violation or contravention of one or more of the provisions of the Grant or that remain unexpended on the earlier of termination or expiration of this Agreement must be returned to State by the District.
4. Responsibility for Grant Funds. The District shall assume sole liability for City or District breach of the Grant. Upon City or District's breach of conditions that requires State to return funds to the federal government, hold harmless and indemnify State for an amount equal to the funds received under the Grant; or if legal limitations apply to the indemnification ability of the Grantees of Grant Funds, the indemnification amount shall be the maximum amount of funds available for expenditure, including any available contingency funds or other available non-appropriated funds, up to the amount received under the Grant.
5. Records Maintenance and Access. The District shall make and retain proper and complete books of record and account and maintain all fiscal records related to the Grant and the Project in accordance with all applicable generally accepted accounting principles, generally accepted governmental auditing standards and state minimum standards for audits of municipal corporations as identified in Exhibit A. The District shall send copies of all records and expenditures to the City.
6. Audit Requirements. The District shall adhere to all terms and conditions regarding auditing requirements set forth by the Grant.
7. Indemnification. The City is relying on the District to perform as described in this Agreement and ensure compliance with the Grant. Should the District fail to perform, such that the City and District are in violation of the Grant, the District shall indemnify and hold harmless City, its agents, officers, employees, and elected officials from all claims, suits, or actions and all expenses incidental to the investigation and defense thereof, of whatsoever nature, including intentional acts resulting from or arising out of the activities of District or its subcontractors, sub-consultants, agents or employees in performance of this Agreement at both trial and appeal level, whether or not a trial or appeal ever takes place including any hearing before federal or state administrative agencies. If any aspect of this indemnity shall be found to be illegal or invalid for any reason whatsoever, such illegality or invalidity shall not affect the validity of the remainder of this indemnification.



### **III. Project Management**

A. District and City agree to the following responsibilities under this Agreement:

1. City shall allow District to construct park and offsite improvements on City property on behalf of City.
2. City shall delegate authority to District to act as the lead agency on development and construction.
3. District shall plan, engineer, and construct park improvements to District standards, and comply with conditions and requirements set forth by the Grant.
4. District shall plan, engineer, and construct offsite improvements to City standards, and comply with conditions and requirements set forth by the Grant.
5. District shall develop construction plans, specifications, and estimates for park facilities, fixtures, open space, and offsite improvements in accordance with District procurement policies.
6. District shall advertise and bid construction plans and specifications for park facilities, fixtures, open space, and offsite improvements in compliance with District procurement policies and State of Oregon public works contracting laws.
7. District shall manage and administer contractor and subcontractor bonds, licenses, insurances and certified payrolls in compliance with District procurement policies and State of Oregon public works contracting laws.
8. District shall coordinate relocation and installation of utilities with existing utility providers.
9. District shall coordinate community outreach with City during design and construction, including quarterly project updates to Milwaukie City Council, Milwaukie Parks and Recreation Board, and District Advisory Board.
10. District shall administer the Grant as stated in Subsections II.A.1 and .2 above.
11. District shall provide City with as-built construction plans upon completion of project.

## **IV. Other Terms and Conditions**

A. District and City agree to the following responsibilities under this Agreement:

1. City shall retain ownership of park lands and open space, offsite infrastructure and all other improvements that are not moveable and integral to the built out environment following completion of construction. For example, concrete pads, paths and walkways, sidewalk and curb improvements, striping, restroom facilities, shade structures, grading and scarifying of soils, imported fill material, trees, shrubs, grasses, and other landscaping materials.
2. District shall retain ownership of fixtures which are easily moveable and are not part of the permanent built out environment following completion of construction (i.e. picnic tables, signage, and waste receptacles) except for any portion of playground equipment paid for by the Linwood Neighborhood District Association.
3. District liaison:

Scott Archer, Director  
North Clackamas Parks and Recreation District  
150 Beaver Creek Road  
Oregon City, OR 97045  
(503) 742-4421  
SArcher@co.clackamas.or.us

City liaison:

Mitch Nieman, Assistant to the City Manager  
City of Milwaukie  
10722 SE Main Street  
Milwaukie, OR 97222  
(503) 786-7573  
niemanm@milwaukieoregon.gov

## **V. Amendment**

This Agreement may be amended at any time with the concurrence of both parties. Amendments become a part of this Agreement only after the written amendment has been signed by both parties.

**VI. Term of Agreement**

This Agreement shall become effective upon final signature and shall expire, unless otherwise terminated or extended, on October 31, 2018.

**VII. Termination of Agreement**

- A. This Agreement may be suspended or terminated prior to the expiration of any term by:
  - 1. Written notice provided, with or without cause, by either party no less than 90 days prior to the date of termination;
  - 2. Written notice, in the case of a default under the terms of this Agreement, giving no less than 21 days' notice of the alleged default, with opportunity to cure within the 21-day period; or
  - 3. Mutual written agreement by the City and District.
- B. Termination of this Agreement shall not discharge the obligations of the District accrued prior to termination, including but not limited to, the obligation to allow audit or inspection.
- C. Survival. If this Agreement is terminated and there's a third party claim, the District would still indemnify the City even though the Agreement is no longer in effect.

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IN WITNESS WHEREOF, City has caused this Agreement to be executed by its duly authorized undersigned officer and the District has executed this Agreement on the date herein above first written.

**CITY OF MILWAUKIE**

**NORTH CLACKAMAS PARKS  
AND RECREATION DISTRICT**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name & Title

\_\_\_\_\_  
Printed Name & Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date



Gregory L. Geist  
Director

April 6, 2017

Board of County Commissioners  
Clackamas County

Members of the Board:

Approval of Add Work Letter Agreement between the Oregon Department  
of Transportation and Clackamas County Service District No. 1  
for OR213: SE Lindy Street – SE King Road Utility Adjustment Work

<b>Purpose/Outcomes</b>	Agreement between Clackamas County Service District No. 1 and the Oregon Department of Transportation for utility relocation/adjustment work.
<b>Dollar Amount and Fiscal Impact</b>	Clackamas County Service District No. 1 budgeted funds for FY 2016-2017. Work under contract not to exceed \$10,000.
<b>Funding Source</b>	Clackamas County Service District No. 1 Operating Fund. County General Funds are not impacted.
<b>Duration</b>	July 1, 2017 to June 30, 2018
<b>Previous Board Action</b>	None
<b>Strategic Plan Alignment</b>	<ol style="list-style-type: none"><li>1. Supports the District's strategic plan that WES will provide the wastewater and stormwater infrastructure necessary to support partner communities and economic development.</li><li>2. Supports the County's goal to build a strong infrastructure.</li></ol>
<b>Contact Person</b>	Dewayne Kliewer, WES Senior Civil Engineer, (503) 742-4572

**BACKGROUND:**

Clackamas County Service District No. 1 (CCSD#1) has many sanitary sewer lines in ODOT streets. Whenever ODOT has a project that will impact our sanitary sewers, CCSD#1 has the obligation to adjust or move our infrastructure to accommodate those changes.

Typically, ODOT will offer to add the scope of those necessary changes to our infrastructure to their construction contract, in order to get a very competitive bid for the work and to make coordination of those changes the responsibility of the contractor doing the roadwork for ODOT. This has always worked out in the best interest of both ODOT and CCSD#1.

Such is the case with ODOT's OR213: SE-Lindy Street – SE King Road project. CCSD#1 has ten manholes that will need to have the frame and cover elevation adjusted to meet the new proposed road grades. Adding this work to the ODOT contractor's scope is going to make the cost and coordination for this work favorable to both parties.

The Add Work Letter Agreement was reviewed by County Counsel.

**RECOMMENDATION:**

District staff recommends the Board of County Commissioners acting as the Governing Body for Clackamas County Service District No. 1 approve Add Work Letter Agreement between the Oregon Department of Transportation and Clackamas County Service District No. 1 for OR213: SE Lindy Street – SE King Road Utility Adjustment Work and authorize the Director of Water Environment Services to execute on the Board's behalf.

Respectfully submitted,

Greg Geist, Director  
Water Environment Services



# Oregon

Kate Brown, Governor

**Department of Transportation**

Right of Way Section

4040 Fairview industrial Drive SE,

MS#2

Salem, OR 97302-1142

Phone: (503) 986-3600

Fax: (503) 986-3625

March 7, 2017

Clackamas County Service District No. 1

Attn: Dewayne Kliewer  
150 Beaver Creek Rd  
Oregon City OR 97045

**SUBJECT: Add Work Letter Agreement – Fixed Cost**  
**PROJECT: OR213: SE LINDY ST - SE KING RD**  
**KEY#: 18779**

Dear Mr. Kliewer:

This letter serves as an agreement between Clackamas County Service District No. 1 and the Oregon Department of Transportation (ODOT) for utility adjustment work added to the above titled Oregon Transportation Commission project. This letter agreement provides the details regarding the deposit of monies for construction of utility relocation work that is not reimbursable. The financial responsibilities of each party will be in accordance with State policy and 23 CFR 645A (Code of Federal Regulations). Clackamas County Service District No. 1 will pay based on the unit cost listed below. Bid quantity will be adjusted up or down to reflect changes in field quantities. The letter discusses the scope of utility work added to the contract, the project status, and the financial responsibilities. At the end of the letter, a space is provided for your signature, allowing you to express your acceptance of the letter's conditions.

Clackamas County Service District No. 1 has requested to have their valve adjustments included in the highway construction contract so that the work would be performed by the State's construction contractor by an email dated March 6, 2017. The work will be added to the contract as requested.

### **Clackamas County Service District No. 1 Cost Responsibilities**

Since Clackamas County Service District No. 1 facilities are located on State right-of-way, Clackamas County Service District No. 1 will be responsible for paying the adjustment costs of \$10,000.00 for ten Minor Adjustment of Manhole by using the awarded bid costs.

**Clackamas County Service District No. 1 agrees to submit a maximum of \$10,000.00 for 10 Minor Adjustment of Manhole (0490-0120000E).**

With regard to the payment of funds, the Oregon Constitution states that the revenue collected from taxes on motor vehicle use and fuel are to be used exclusively for highway purposes. This means that highway trust funds cannot be utilized for non-highway purposes, i.e., non-reimbursable utility work. Therefore, funds covering the cost of non-highway construction must be deposited with the agency administering the highway construction contract in advance of the actual construction. Since ODOT will administer the contract for this project, Clackamas County Service District No. 1 will be required to make a deposit of monies to ODOT for the non-reimbursable work included in the contract. At this time, no

payment of funds is due. A letter will be sent by our Active Transportation Section, prior to the bid opening, requesting the above stated payment.

All work added to the project will comply with Buy America requirements as described in Section 00160.20 of the Oregon Standard Specifications for Construction [http://www.oregon.gov/ODOT/HWY/SPECS/Pages/2015\\_special\\_provisions.aspx](http://www.oregon.gov/ODOT/HWY/SPECS/Pages/2015_special_provisions.aspx). Should Clackamas County Service District No. 1 supply materials to the ODOT contractor, those materials will also comply with Buy America requirements.

If the terms set forth above are acceptable to Clackamas County Service District No. 1, please sign in the space provided on the following page and **return the original to this office by March 21, 2017**. If you have any questions, please do not hesitate to contact me at 503-986-3658.

Sincerely,



Heather Howe

State Utility Liaison

4040 Fairview Industrial Drive SE MS#2

Salem, OR 97302-1142

Cc: Jane Estes, Region Utility Specialist

By signing this letter agreement, you agree to the conditions of the letter and acknowledge that Clackamas County Service District No. 1 is responsible for the cost of the non-reimbursable utility work. Clackamas County Service District No. 1 will compensate ODOT for that portion of non-reimbursable utility work added to ODOT's contract, including any administrative costs ODOT incurs that are associated with the work.

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Print name and title of the authorized Clackamas County Service District No. 1 representative then sign and date as provided below.

**APPROVED:**

**Name** \_\_\_\_\_

**Signature** \_\_\_\_\_

**Title** \_\_\_\_\_

**Date** \_\_\_\_\_

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Approved as to Form:  _____ County Counsel
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