

Clackamas County
Local Implementation Strategy (LIS)
Metro Affordable Housing Bonds
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I. Introduction.....pg. 2

II. Strategy Development.....pg. 5

III. Implementation Phases.....pg. 6

IV. Organizational Plan for Implementation.....pg. 6

V. Project Selection Process.....pg. 7

VI. Leveraging Other Affordable Housing Resources.....pg. 9

VII. Project Selection Criteria.....pg. 11

VIII. Project Implementation.....pg. 15

IX. Reporting on the Implementation Strategy.....pg. 18

Exhibit 1 – Outreach Report.....pg. 19

Exhibit 2 – HACC Portfolio Approach (Tracking Worksheet)pg. 32

Attachment 1 – Clackamas County Metro Boundary Map.....pg. 33

I. Introduction

Clackamas County sits south of the Portland metro area in the Willamette Valley and in the shadow of Mt. Hood. Here we have national forests, hideaway lakes, winding rivers, thriving agriculture, bustling cities, and small town communities.

We're a county with a rich history dating back to 1843 when the early settlers created the four original districts that made up Oregon, naming Clackamas County after the Clackamas Indians.

Today, our county covers nearly 1,900 miles with a little more than 400,000 residents, making us the third largest county in the state by population.

More than half of our residents live in 16 cities; the rest live in unincorporated areas. We are a county of diverse and welcoming communities, where all residents are essential. Diversity, equity, and inclusion are of great importance in our county, but due to the high cost of housing and increasing wage gap, many residents increasingly struggle to remain housed.

This Local Implementation Strategy (LIS) aims to sustain Clackamas County's livability, particularly for those most in need. This LIS will serve as a guide for the county and our partnering communities as we create affordable housing using the Metro Affordable Housing Bond. As a county without entitlement cities (cities with a population of at least 50,000), all bond resources will run through the Housing Authority of Clackamas County (HACC).

Clackamas County is excited to be an implementing jurisdiction of the Metro Bonds. These resources will play a critical role in creating opportunities and will expand our cities racial and cultural and economic diversity while meeting a range of important housing needs that will provide increased stability for decades to come. Our highly skilled staff and committed elected officials will work collaboratively with our community and jurisdictional partners to expedite review periods for projects that come our way in order to capitalize on this exciting resource and get housing built as quickly as we can.

Clackamas County Housing Needs

In 2018, Clackamas County embarked on an ambitious look at a countywide Housing Needs Analysis (HNA). To undertake this endeavor required the collaboration and cooperation of all Clackamas County cities as well as our unincorporated communities. The study was contracted with ECONorthwest with the goal of developing an in-depth understanding of the housing needs in our county, as well as where we need to focus additional resources (monetary or partnership driven) to create opportunities and provide a lasting impact for residents that have been historically marginalized.

To date, Clackamas County has 2,806 existing regulated housing units within the Metro boundary. Of these regulated units there are 543 Public Housing units operated by HACC. The information below represents data provide to HACC through a county-wide Housing Needs Assessment (HNA) and is representative of **new** affordable rental housing needs.

Estimated (New) affordable rental housing needs, based on Median Family Income (MFI), forecasted for the next twenty years (2019-2039) in the urban unincorporated areas of Clackamas County.

Unincorporated* Urban Areas	Extremely Low Income (<30% MFI Need)	Very Low Income (30-50% MFI Need)	Low Income (50-80% MFI Need)	Total affordable rental housing need between 0-80% MFI
All Urban	1,175	1,166	1,666	4,007

Source: U.S. Department of Housing and Urban Development. U.S. Census Bureau, 2012-2016 ACS Table 19001.

*The data provided is still in DRAFT form and will be updated once finalized.

Estimated rental housing needs, based on Median Family Income (MFI) forecasted for the next twenty years (2019-2039) within the Metro boundary of incorporated cities of Clackamas County.

City*	Extremely Low Income (<30% MFI Need)	Very Low Income (30-50% MFI Need)	Low Income (50-80% MFI Need)	Total affordable rental housing need between 0-80% MFI
Gladstone	62	72	51	185
Happy Valley	473	548	1,025	2,046
Lake Oswego	198	167	198	563
Milwaukie	256	167	274	316
Oregon City	441	353	599	1,393
West Linn	98	164	102	364
Wilsonville	333	592	347	1,272

Source: U.S. Department of Housing and Urban Development. U.S. Census Bureau, 2012-2016 ACS Table 19001.

*The data provided is still in DRAFT form and will be updated once finalized.

Available Resources and Framework Targets

This Implementation Strategy focuses on the housing that will be developed within the eligible Metro boundary in Clackamas County. Bond resources are designated for use within Metro jurisdictional boundaries and are not applicable to incorporated and unincorporated communities outside of this boundary; see Attachment 1 for a detailed map of the applicable Metro boundary for Clackamas County. Bond revenues dedicated to HACC are **\$116,188,094**. The goal for HACC is to support at least **812 units of affordable housing** in the community. These can be newly built units or existing units that are at risk of rapidly rising rents. While many of these units are expected to provide rental housing, affordable homeownership opportunities units may also be supported with the bond resources.

Recognizing that our lowest income neighbors have the greatest challenges in securing affordable housing, and consistent with the Metro Bond Framework, HACC has set a goal that at least **333** of these units will be affordable for households with incomes at or below 30% of area median income. These units may serve people with special needs as well as people who earn low wages or have fixed incomes. At least **200** of these units will be supported with rental assistance provided by HACC, allowing them to be targeted to the most fragile households. To aid this process, HACC will provide opportunity for developers to access site-based rental assistance via competitive applications at several points throughout the life of the bond. It is currently anticipated that at a minimum, 2/3 of the vouchers will be offered for use on developments that are not the redevelopment of HACC public housing sites. In order to ensure that residents are stable and secure, HACC will work with project sponsors and developers to connect social service agencies and other community partners as a link to supportive services for these affordable housing units.

Because the need for affordable housing crosses many income levels, and because serving moderate-income households can effectively provide a source of cross-subsidization for lower-income households, HACC may also explore options to include units that have rents appropriate for households with incomes from 61% to 80% of area median income. No more than **81** Bond financed units will have rents at this level. The need for affordable housing crosses income levels, and serving higher-income households can create cross-subsidization for very low-income households.

The private rental housing market has always been concentrated on small unit sizes, while the need for rental housing crosses a range of household sizes. This mismatch between need and available units is especially difficult for lower-income households. As a result, the Metro Bond Framework has set a goal that half of the units developed under the bond program must include two or more bedrooms. For HACC, this means that at least **406** units will include two or more bedrooms.

Advancing Racial Equity

The Housing Authority of Clackamas County prioritizes advancing racial equity for all its activities. This is an ongoing priority of HACC to mitigate decades of government policy from the federal to the local level that contributed to disparate outcomes for communities of color. People of color struggle disproportionately with unaffordable housing, displacement and homelessness. The implementation of the Affordable Housing Bond provides an opportunity to work to address this inequity and to meet the needs of historically marginalized communities.

Efforts and opportunities to address racial equity occur at many points in the implementation of the Affordable Housing Bond. Opportunities to advance racial equity include community engagement and plan development, project selection, the inclusion of minority businesses and workforce in the design and construction of housing, the formation of culturally specific partnerships for outreach and services, accessible tenant selection/screening criteria processes, contracting opportunities post construction, and ongoing reporting of outcomes. The specific implementation strategies HACC will employ are discussed in the various sections below.

II. Strategy Development

HACC has developed this LIS by engaging in a comprehensive outreach and review process during the spring and early summer of 2019. Meaningful community engagement is the basis for this LIS. The outreach process resulted in hearing from hundreds of community members and dozens of local stakeholder agencies and jurisdictional partners. This resulted in perspectives on housing needs across Clackamas County especially focused on special needs populations. Exhibit 1 provides a detailed report on the outreach and engagement process; the highlights are included below.

Listening Phase

To inform our LIS, Clackamas County and HACC recognize the importance of community engagement. To help us outline this process, we began active outreach efforts to inform the public about the forthcoming Affordable Housing Bond and the impact it will have on critical housing needs throughout the communities in Clackamas County. Utilizing advisory boards already in place, feedback from our County Commissioners, jurisdictional partners, and our residents, HACC established several opportunities for information sessions detailing our countywide state of housing needs and the guidelines and outcomes expected through the Affordable Housing Bond program. During these information sessions, county staff asked “key” questions of our audiences to help inform how the formation of our LIS and how best to organize implementation. Below represents findings from these sessions.

Review Draft Feedback

This LIS was drafted using the Metro Affordable Housing Bond Work Plan adopted in February of 2019, as well as with feedback from HACC Board, our Housing Advisory

Board (HAB), and feedback during various listening sessions held by HACC over several months. HACC staff will present the draft LIS to the HACC Board for feedback on June 18, 2019. At that point, the LIS draft was made available for community feedback, as well as comments from Metro staff, members of the Metro Housing Bond Oversight Committee, and community groups engaged in the Listening phase.

Local Implementation Strategy Approval

It is anticipated that a final LIS will be reviewed by the Metro Housing Bond Oversight Committee on August 7, 2019, and subsequently by Metro Council on September 5th, 2019. It will be considered by the HACC Board for final County approval on September 10th, 2019.

III. Implementation Phases

Implementation of Bond funded projects is expected to occur over a period of four to seven years. This timeline will allow for the identification of sites, securing needed resources for capital and services, forming partnerships with developers and service providers, procurement of projects through public solicitations, and completing construction. During this period, community needs and opportunities may change. New census data will become available, new community planning efforts may be initiated or completed, and new resources or opportunities may become available while other resources or opportunities may not materialize as anticipated. In addition, certain framework goals may be easily fulfilled, while others may prove more challenging. Because of the dynamic nature of this work, HACC proposes to periodically review, and potentially reset this Implementation Strategy.

HACC proposes to take a portfolio approach to implementing Bond resources, monitoring and adjusting the LIS when appropriate (Exhibit 2). Because the pace of implementation is uncertain, review points will not occur at specific points in time but instead will be based on the commitment of Bond resources to specific projects.

HACC will use Exhibit 2 as an addendum to this Implementation Strategy. As project commitments are made, the tracking worksheet will be updated to show balances of funds available and progress toward framework goals. This will provide a real-time update that can guide the selection of the subsequent projects to ensure that overall goals and resource commitments are consistent with the Metro framework. Should the tracking worksheet indicate that a modification to the adopted Implementation Strategy is advisable; the amendment process will include community outreach and engagement, review by the HAB and amendment by the HACC Board with submission to Metro for review and approval.

IV. Organizational Plan for Implementation

HACC will use a combination of staff and consultants to administer this Implementation Strategy. In-house staff will be responsible for coordinating community engagement and

outreach, project selection process, project documentation and funding processes, as well as overall program monitoring and reporting. The Housing Authority may engage consultants with expertise in financial packaging of affordable housing to review proposed projects during the selection and commitment phases. Similarly, HACC may engage consultants or collaborate with other project funders to leverage their expertise in construction management to help oversee project development.

Some aspects of implementation will require the development of new systems for HACC. Depending on the activity, HACC will either create its own tracking/compliance system or may work with Metro or other jurisdictions to create effective implementation strategies.

In addition to the county general fund, Metro has committed \$2,446,065 of one-time funds to be spent over five years to augment and support Clackamas County's development team and pre-development activities directly related to bond implementation and bond funded projects. Initially, Clackamas County anticipates that these funds will support additional staffing for our Finance and Community Development departments to implement, track and monitor bond resources over the term of the bonds. In addition, these resources will also support our ongoing community outreach engagement strategies.

V. Project Selection Process

HACC will work in partnership with developers/owners that are skilled and interested in providing affordable housing throughout the County's Metro boundary. In addition, the Housing Authority itself intends to be a developer or owner of housing funded under the Bond. HACC expects that the Bond funds may provide support for a total of approximately 8-12 projects. HACC expects that it will be the developer/owner of approximately 450 units of bond-financed housing and will use approximately \$63.9 MM or 55% of the total bond resources with the remaining balance, \$52.3MM or 45%, available for projects sponsored by non-profit or for-profit developers throughout the eligible bond boundary within the county.

HACC will establish a set of expectations for developers/owners to ensure that both the framework goals and racial equity outcomes are achieved. These are requirements that will apply to all developer/owners; they will not be competitive selection criteria. Requirements will include such things as the period of affordability, the inclusion of MWESB contractor participation in the development process, community engagement during predevelopment, and the use of best practice outreach and tenant selection criteria. The specific requirements are described in the Project Selection Criteria and Project Implementation sections below.

The Housing Authority will utilize the Clackamas County Housing Advisory Board (HAB) as a review committee. The HAB is comprised of Clackamas County residents and industry experts from the fields of affordable housing finance, resident services,

homelessness, affordable housing development, real estate management, culturally specific service providers, the elder community and the construction general contracting industry. The HAB will provide feedback to staff and advise the HACC Board regarding proposed Housing Bond projects.

Accessing Bond Resources

HACC anticipates that access to bond proceeds will occur through several processes; Notice of Funds Availability (NOFA), Requests for Qualification (RFQ) and Requests for Proposals (RFP), and in select cases via negotiated or sole source agreements, are all examples of proposed bond allocation mechanisms. These various avenues for accessing bond resources are explained in greater detail below. However, in all cases in which bond resources are allocated, the selection process will include a set of expectations for all developers/owners to ensure selected projects achieve both the framework goals and racial equity outcomes. These requirements include a 60-year affordability covenant for new construction, a minimum of a 30-year affordability covenant for acquisition/rehab inclusion of minority and women-owned contractor participation in the development process and the use of best practice outreach and tenant selection criteria..

NOFA

HACC anticipates that for sites that are not part of HACC's public housing portfolio competitive NOFA processes will be used to support the release of \$52.3MM (45% of bond proceeds) for projects sponsored within the eligible boundary for Clackamas County.. A competitive NOFA is expected to be released as early as fall of 2019 providing early access to bond resources for projects that can demonstrate project readiness.

Request for Qualification (RFQ) or Request for Proposal (RFP)

HACC anticipates that many but not all sites developed throughout our public housing portfolio will be solely developed by HACC. In those instances where a site is not being developed by HACC we anticipate issuing through a competitive RFQ or RFP our intent to allocate resources from the \$63.9MM (55% of bond proceeds) set aside for this portfolio. Though subject to change, HACC anticipates that the first of our public housing redevelopments, Hillside Park in Milwaukie, will begin in 2021. Following Hillside Park, HACC expects that Clackamas Heights in Oregon City (also a public housing site) would begin its process for redevelopment approvals in 2021 with an RFP for bond resources available sometime after final redevelopment approvals have been granted.

Negotiated or Sole-Source Agreements

In some instances, HACC may choose to engage in a negotiated agreement or sole-source proposal. An example of this type may be the acquisition and rehabilitation of an existing building that provides an opportunity to further Clackamas County's affordable housing stock, or when a developer or landowner has an available site that is adjacent to publically owned property. In both described cases, time may not allow for a competitive

funding release and therefore, HACC would instead consider a rolling process for these types of developments.

In all cases, any proposed use of bond resources will be reviewed first through HACC staff and then via the Housing Advisory Board (HAB) before any recommendation to the HACC board and Metro.

An exception to this process is the Gladstone SRO affordable housing project which had been identified as a potential Bond funded project prior to the development of this LIS. This project is expected to be the first project to be funded with Housing Bond resources in Clackamas County and the reasons for being exempted from this selection process are detailed below.

Phase 1 Project – The Gladstone SRO Affordable Housing site

Consistent with Metro and Clackamas County's hopes to demonstrate timely progress in Bond implementation, HACC has identified a Phase 1 Project. The project, located in Gladstone, is the re-development of an older special needs housing site that can provide up to 45 units. HACC will be the developer/owner of the project.

The site is currently controlled by HACC and has been vacant for a number of years. It had previously been used as a nursing home and then a residential facility for youth. The site can be easily re-adapted, has good service spaces, is close to commercial services, transportation, and is affordable. The development of the Gladstone Single Room Occupancy (SRO) can fill a gap in the existing continuum of housing in Clackamas County by providing property for a singles population with deeply affordable rents and wrap around supportive services.

HACC envisions the project will provide single room occupancy units to single adults. All of the units will have tenant rents at or below 30% AMI and will have project-based rent assistance. HACC is continuing to explore whether the project would be targeted to a specific sub-population or available to a range of income-qualified singles. HACC will explore the opportunity for partnerships with service providers who may have clientele needing housing and/or providers who may have valuable services to offer to residents. The space configuration allows the possibility of locating a medical clinic on site as well as on-site food preparation services available to residents.

The bond funds in this project will be leveraged with 4% tax credits and the site is located in a qualified census tract, increasing the resources generated by the tax credits. Other leverage sources may include the Multifamily Energy Program (MEP), Permanent Supportive Housing (PSH) resources, and a permanent mortgage.

Public Housing Re-Positioning

The Housing Authority is working on master plans to re-position its existing public housing portfolio. There are currently three primary public housing sites—Hillside Park, Clackamas Heights, and Oregon City View Manor. Long-term plans for these sites may include possible sales of current land holdings associated with these sites, possible

purchases of adjacent sites and ultimately the re-development of the bulk of the existing 300 units into new communities. These projects are some of the oldest public housing in Oregon. They have a number of problems including poor physical condition, poor use of land, poor locations and over concentration of lower income households. The Housing Authority's goal is to embark on community-based input and planning exercises that result in well-built mixed-income communities with modern levels of density.

The Housing Authority expects that the new master plans will result in substantially more units of affordable housing. Use of Bond funds to support this re-positioning effort is consistent with Metro requirements that Bond financing only be used for existing affordable housing sites that are part of the redevelopment of a residential property with existing public affordability restrictions, as long as the redevelopment results in a substantial net increase in the total number of affordable homes. In such cases, Bond funds may only be used for the portion of new homes that are not replacing regulated affordable homes currently on the site. HACC expects that it will use some portion of the Bond funds in these re-development projects. While the specific sites, the number of units and characteristics of those units are not set at this time, it is expected that the projects selected for Bond funding will emphasize large family and deeply affordable units.

Should the Housing Authority identify public housing redevelopment sites under this Implementation Strategy, it will determine whether to develop/own the project themselves or to select a developer/owner; HACC anticipates acting as a developer on at least 300 of our public housing units. Should HACC decide to select a developer/owner it may use an RFQ, RFP, or sole source selection process.

Sites Identified by Metro

The allocation of Affordable Housing Bond funds includes an allocation for land acquisitions carried out by Metro rather than by the implementing jurisdictions. Metro has allocated an estimated \$12 million for acquisition in Clackamas County. We will encourage Metro to purchase sites throughout the eligible boundaries in the county to further leverage our allocation of bond funds. HACC is committed to working closely with Metro should such sites be identified. When such sites are identified, HACC and Metro plan to select a developer/owner through a competitive process.

Sites Proposed by Developers

The Housing Authority may accept unsolicited proposals from developers for projects to be funded under the Bond. Developers should be aware that, depending on progress against the Bond framework, such proposals may need to achieve specific targets for income levels, cost, unit types, geographic area, racial equity, accessibility, or other characteristics. Developer/owners are encouraged to work closely with HACC to ensure that their proposals are responsive to the evolving needs of HACC's Implementation Strategy.

VI. Leveraging Other Affordable Housing Resources

While the Metro Bond resources are substantial, in order to accomplish the unit targets of the Bond, these funds will need to be blended with other public and private funding sources, including other HACC resources. A number of principles will guide efforts to leverage the Bond funds:

- **Maximize the use of non-competitive resources.** The 4% LIHTC program is available on a non-competitive basis to provide equity for affordable housing development. This program is especially useful for larger projects or scattered site projects that can be bundled to achieve the scale desired by equity investors. Developing projects in Qualified Census Tracts (QCTs) or Difficult to Develop Areas (DDAs) can maximize the usefulness of the 4% tax credits.
- **Maximize use of private resources.** Many projects will generate sufficient rental income to be able to make debt service payments on loans from private banks. While ensuring that projects have appropriate operating budgets and reserves, private debt should be secured for projects whenever feasible. Additionally, where bonds may be used for homeownership opportunities, the owners' mortgages are an example of leveraging private sources.
- **Maximize local resources.** A variety of local resources may be available to support capital and operating expenses:
 - **Project-based rental assistance.** HACC has committed project-based rental assistance for 200 units to Bond projects. This assistance will allow residents to pay based on their household income, while the project will receive a set rental income based on the rental assistance payment standard.
 - **Property tax exemption.** For project developed/owned by HACC, it will take advantage of property tax exemption under the provisions of ORS 307.092--this is the statute that provides property tax exemptions for housing authorities. It may also consider this exemption to projects under co-development agreements with HACC.
 - **Publicly owned land.** HACC will prioritize projects developed on County/HACC-owned or other publicly owned sites. The ability of HACC or other jurisdictions to donate the full value of the sites may vary, but discounted values would likely be available.
 - **Explore other local resources.** The Clackamas County Board and HACC will work with bond-eligible jurisdictions to identify local resources that support bond financed projects in an effort to encourage bond developments in jurisdictions committed to affordable housing.
 - **Seek other existing affordable housing resources (Federal, State and County resources).** HACC recognizes that despite the substantial amount of Bond funding, projects may have financing gaps that are best filled with other traditional affordable housing program resources. Though it is not anticipated that these competitive resources will be utilized to support bond-financed

developments, sources outside the purview of HACC may be needed to complete financing packages for specific projects. In partnership with the selected developer, HACC will work with other funders in a transparent way to find the most effective and efficient way to bring these resources to Bond funded housing projects as necessary.

- **Support the pipeline of other affordable housing projects.** While much of HACC’s efforts during the implementation of the Affordable Housing Bond will be focused on moving the pipeline of Bond funded projects forward, the ongoing availability of other Federal, State, and local affordable housing resources means that there is a likelihood other projects may move forward during the same timeframe. HACC will monitor the pipeline of projects proposed and funded throughout Clackamas County and will collaborate with developers and jurisdictions throughout the county to identify the most appropriate funding packages and other support that can be allocated to those projects.
- **Funding for resident and supportive services.** HACC will work with regional and state partners to identify a consistent funding source to serve vulnerable homeless or at risk populations. It is through consistent funding of resident and supportive services that vulnerable populations can remain housed and help the project succeed financially.

VII. Project Selection Criteria and Metro Framework

HACC will consider a number of factors in the selection of Housing Bond projects. The first consideration will be how each project contributes to the accomplishment of the goals in the Metro Framework. Under the Framework, HACC has the following targets:

Framework Targets	
Total Units	812
Minimum number of 30% AMI Units	333
Maximum number of 61% to 80% AMI Units	81
Minimum number of 2 Bedroom & Larger Units	406

HACC does not expect that each project will reflect the ratios expressed by these targets, but instead that the overall portfolio of funded projects will achieve this mix.

HACC does expect that most projects will include some units that are two bedrooms or larger. The ratio of small and large units will reflect the characteristics of the target

population of specific projects, and that in turn, should reflect characteristics of a site in terms of whether it is best suited to families with children or smaller families.

HACC does expect that most projects will include some units with rents at 30% AMI. In some cases, projects will be targeted to low wage earners, while others may be targeted to people with disabilities or other special needs, or people who have experienced homelessness. Some projects may be designed exclusively to have 30% units or have high concentrations of 30% units with corresponding supportive services.

HACC hopes to include 61%-80% AMI units when that helps to cross-subsidize lower income units or reduces the amount of Bond financing needed for the project.

HACC will focus its Bond financed affordable housing on new construction multi-family rental projects and may also consider multi-family acquisition/rehabilitation projects. Additionally, HACC is considering investing Bond resources in homeownership strategies should the right location and opportunity arise. In our community engagement, participants from communities of color strongly emphasized a desire to see Bond resources promoting access to home ownership among communities of color in Clackamas County.

Furthering Clackamas County's Affordable Housing Goals

In addition to fulfilling the LIS, HACC will work to align the affordable housing developed with the Bond to support a variety of local goals. These include:

- Working to create housing opportunities across the geographic area of this Implementation Strategy. This includes the cities and unincorporated areas of Clackamas County that are in the Metro area.
- Focusing its Bond-financed affordable housing on new construction of multi-family rental projects and explore homeownership opportunities.
- Considering acquisition/rehabilitation projects to prevent displacement.
- Geographic Goals – HACC looks to support projects in opportunity neighborhoods that have good access to transportation, commercial services, community amenities, and provide the opportunity to create inclusive mixed-income neighborhoods.
- Target Population Goals – During the Listening phase, we received reminders of the need for senior housing, family housing (to include three and four-bedroom units), housing accessible to high needs populations, housing that is compliant with the American with Disabilities Act (ADA), and housing for individuals exiting the foster care system. Due to limited resources and the small number of projects to be funded under the Bond, addressing all these needs will not be feasible, but HACC will strive to assist as many of these needs as possible. To do so, HACC will require that project sponsors of bond developments are holding at least two engagement sessions during predevelopment to actively engage with the community surrounding the sites location and to provide listening and feedback sessions to the potential residents that may live there.

- Complementing other affordable housing-related activities – The Housing Bond funds allow HACC to leverage its resources to continue its work on other affordable housing strategies and in other parts of the county that aren't eligible for Bond proceeds. These include working with property owners to identify ways to improve the housing stock while avoiding forced displacement of tenants, collaborating with market-rate developers and nonprofits to also consider development in non-Metro boundary communities, prioritizing Community Development resources to support non-Metro boundary developments, working with homebuilders to increase affordable homeownership stock.
- HACC supports the principle that housing created with the bond should maximize housing choice for tenants.

Racial Equity

HACC's approach to racial equity in project selection will take into consideration factors such as:

- Increasing affordable housing in areas with existing underserved diverse populations, especially in areas that may be subject to gentrification. Throughout our community engagement process, the needs of those historically underserved in growing areas of gentrification were heard. Priority will be placed on developments that provide by location and amenities the ability to create long-term affordable housing with the following criteria considered:
 - Providing new affordable housing in high opportunity neighborhoods and sites. This would include sites that have good access to transit (e.g. bus, rail, bike paths and pedestrian corridors), jobs, quality schools, commercial services, parks & open space, etc.
- Supporting project teams that have a proven track record of:
 - Outreach, engagement, and ensuring participation of minority and women-owned contractors in pre-development and construction of the project, as well as the ongoing maintenance of the building
 - Engaging targeted and/or marginalized communities, communities of color as part of its leasing process
 - Creating an inclusive tenant screening criteria process, minimizing barriers to housing experienced by communities of color

HACC will prioritize projects addressing the historical racial disparity and lack of housing access and opportunity to build equity and generational wealth experienced by communities of color. Addressing these disparities may be through projects sponsored by culturally specific organizations, or projects sponsored by partnerships in which culturally specific organizations have a meaningful role in project design and operations, or sponsors that provide sufficient proof of their ability to connect with communities of color to promote housing access and/or affordable homeownership opportunities

Connection to Services

HACC expects that Resident Service Coordination will be provided at all projects, appropriate to the level of need of the target population. Resident Services will focus on eviction prevention, helping residents access to mainstream services for which they may be eligible, empowerment services and community building activities.

Projects serving high needs populations will require robust supportive services to ensure resident stability and positive outcomes. HACC currently provides limited supportive services. HACC will work closely with other Clackamas County departments to help connect developer/owners to public and private service providers in the community to create needed partnerships. HACC will evaluate a project's target population and service plan to ensure that it is appropriate and durable. HACC will approve resident service fees in project operating expense budgets.

HACC heard throughout our community engagement with historically under-represented communities, the importance space and place play in regards to the development of a site; importance that moves a building from simply housing to a place called home. To that end, HACC will require that developers/sponsors of bond-financed units detail within their proposals and design how they intend to meet and promote community gathering space opportunities. These may be opportunities both internal to their developments or through site locations that emphasize access to community building through existing amenities such as: parks, libraries, community centers, and other place-making opportunities.

Project Cost/Leveraging Funds

HACC plans to use Bond funds to support a portfolio of projects that provide the best return on investment in the form of long-term sustainable housing. These projects will be characterized by efficient design and durable construction. They will use cost-effective green building measures to create efficient use of energy and water, and select materials to create healthy living spaces. They will be well aligned with the needs of the target households in terms of space, amenities and service requirements, and will be valuable assets in the communities in which they are located.

The blend of funding sources will have an impact on both hard and soft costs. Hard costs will be impacted by development standards of investors, lenders and other public funders. Soft costs will vary with requirements for specific legal, accounting, reserve requirements, and fees. Leverage will also be impacted by the service needs of the residents.

HACC will evaluate all proposed projects to ensure that the costs are reasonable and appropriate to the specific project. In doing this evaluation HACC will focus on the amount of Bond funds needed rather than the total development costs of projects. This evaluation may consider:

- Scale appropriate to the target population.
- Scale appropriate to the neighborhood in which the project is located.
- Costs associated with mixed-use projects.

- Quality of construction materials.
- Costs associated with the service needs of the target population.
- Reasonable fees and reserves.

HACC recognizes that in order to accomplish the overall unit target, it will need to have an average Housing Bond expenditure per unit of approximately \$143,000. Some projects may receive significantly fewer Bond funds than this amount, while others may receive significantly more. The Bond funding levels available for specific projects or funding processes will be clear in the Exhibit 2 tracking worksheet that is attached to this Implementation Strategy.

Capacity/Readiness to Proceed

Affordable housing is a specialty business that differs in many ways from market-rate housing or other real estate development. HACC will seek to partner with non-profit, for-profit, or governmental organizations that have demonstrated skills as affordable housing developer/owners. Expertise with the framework target unit types and with the specific population proposed by a project will also be considered.

Timely implementation of the Housing Bond is critically important and was a point of emphasis throughout our community engagement activities. In its selection process, HACC will prioritize projects that have a clear path to timely completion. HACC may prioritize projects that have appropriate zoning, have secured much or all of the other financing sources, have secured needed service partnerships, have a clear and achievable racial equity plan, etc. While HACC may not make concept endorsements until projects meet benchmarks that indicate the likelihood of projects coming to fruition, HACC suggests that interested developers begin conversations with the Housing Authority at the earliest stages of pre-development to ensure that project programming aligns with the Implementation Strategy.

VIII. Project Implementation

Review & Approval of Projects

Bond-funded projects will go through a multi-stage review and approval process as follows:

- **HACC concept endorsement.** To be forwarded to Metro for concept endorsement a project must, at a minimum, have site control, a preliminary development plan, the preliminary estimate of total development costs, a preliminary estimate of needed Housing Bond funds, and an identified development team. HACC will process concept endorsements first at the staff level, then review by the Housing Advisory Board, and review by the HACC Board work session.
- **Metro concept endorsement.** HACC staff, in conjunction with Metro staff, will present the project to Metro for endorsement by the Metro COO. Metro will review the project for conformance to the adopted Local Implementation Strategy.

- **HACC project approval & funding authorization.** As the project completes due diligence and moves to financial closing, HACC will process project approval by asking the HACC Board to take action.
- **Metro project approval & funding authorization.** HACC staff, in conjunction with Metro staff, will present the project to Metro for final approval and funding authorization.
- **Release of Funds.** Once a project has received approval by HACC and Metro, funds will be released to the Housing Authority and disbursed to the project in accordance with the provisions of the project documents and the Metro Intergovernmental Agreement.

Project Closing

- **Metro-Approved Regulatory Agreement.** All projects will be required to execute a Metro-approved Regulatory Agreement that acknowledges the use of Metro Housing Bond funds and the restrictions associated with the use of such funds. The Regulatory Agreement shall be recorded against the project at or prior to closing.
- **Period of Affordability.** The Regulatory Agreement will generally specify a 60-year period of affordability. For acquisition projects that are more than 10 years old, HACC may consider a shorter period of affordability, but no less than 30 years. The Regulatory Agreement will provide a first right of refusal for qualified nonprofit organizations or government entities to acquire the project upon expiration of the affordability period.
- **The accomplishment of Framework Targets.** The Regulatory Agreement will also specify the level of affordability and the unit bedroom sizes of the project
- **Reporting Requirements & Monitoring During Operations.** The Regulatory Agreement or similar agreement will also provide requirements for periodically providing information relating to the project's financial performance, physical condition, occupancy, tenant income verification, and voluntarily collected tenant demographics. The agreement calling for these reports shall provide that reports will be made for the benefit of both Metro and the Housing Authority of Clackamas County. The agreement shall also provide physical access to the property when requested by Metro, HACC, or other project financing partners.
- **Jurisdiction Documents.** HACC will require a variety of other documents relating to the project. These may include:
 - Development & Disposition Agreements. In the case of properties controlled by HACC, the Housing Authority will develop agreements relating to the transfer of property to the developer/owner.
 - HACC will develop documents relating to the form of investment of Bond Funds. These may vary depending on the projected cash flow of different projects and may take the form of cash flow dependent loans or grants. In general, HACC will support the allocation of modest amounts of program income to restricted reserve accounts dedicated first to the provision of Resident Services. Projects that are expected to have more significant program income may have requirements for cash flow dependent distributions to the Housing Authority.
 - HACC will specify requirements relating to the implementation of racial equity strategies. Strategies will be developed for each project, and requirements will be documented in agreements with the Housing Authority. This will include:

- **MWESB Contracting.** Project sponsors will be required to make best faith efforts to achieve 20% participation of subcontracting of development hard and/or soft costs to certified minority, women, emerging small businesses. Project sponsors will be required to provide documentation of subcontracting efforts and results.
- **Workforce Participation.** The Housing Authority is interested in encouraging participation in project workforce hours by minorities, women and disabled veterans. While specific programs to further this goal are not developed at the time of writing this Implementation Strategy, the Housing Authority will work with Metro, other implementing jurisdictions, and with project sponsors to explore ways to maximize participation in project workforce hours.
- **Affirmative Marketing, Tenant Selection & Lease-Up.** Consistent with Metro policy and feedback provide throughout our community engagement (please see targeted engagements to specific populations in Exhibit 1, pg. 23) outreach sessions, HACC will work to ensure that Bond financed housing serves communities of color, families with children and multiple generations, people living with disabilities, seniors, veterans, households experiencing or at risk of homelessness, and households at risk of displacement. HACC will require that project developers/owners make best faith efforts to make units available to minorities and disadvantaged populations using best practice strategies. In general, this will require:
 - Affirmative outreach and marketing to target populations. Developers/owners, and their property management companies (if applicable) will be expected to engage in proactive efforts to make disadvantaged populations aware of the availability of units, and the process and timeline for application. HACC will work with project sponsors to identify specific target populations for each project and will review the proposed outreach and marketing strategy for each project.
 - HACC will require that project sponsors use low-barrier screening criteria that balance access to target populations, project operations, and community stability. Typical requirements may include less than standard market apartment income-to-rent ratios, reduced credit history requirements, and criminal history requirements that only consider recent convictions that are most directly tied to tenant success. Project sponsors will be required to review appeals to denials of standard screening criteria that take into consideration the efforts of applicants that demonstrate stability and potential for tenant success. Project sponsors are also required to review appeals if the disqualifying aspects of denial are related to a disability and make reasonable accommodations as appropriate.

Project Monitoring

Projects will be subject to monitoring throughout the development process and period of affordability. The monitoring process and expectations will be documented in agreements with the City. In general, this will include:

- **Monitoring During Development & Lease Up.** HACC will require monthly reports during the project development and lease-up period and will conduct monthly site inspections in coordination with other funding partners to ensure progress to on-time and on-budget completion. HACC will sign off of any change orders and on monthly draw requests.
- **During Operations.** HACC will require annual reports that include information about project physical condition, fiscal condition, occupancy, tenant income verification, and voluntarily collected tenant demographics. HACC will conduct periodic site inspections in coordination with other funding partners.
- **Post-Completion Monitoring.** In addition to monitoring of operations, HACC will revisit each developments engagement plan at “natural” stages of completion and stabilization to check proposed goals against actual achievements. The intent of this stage is to reconnect with our community stakeholders to report on outcomes to date and to assess whether we need to revisit the goals of our LIS. Areas of significant interest may be in the following categories and times
 - MWESB proposed outcomes versus actual (50% and 100% construction completion);
 - Workforce participation (50% and 100% construction completion);
 - Low-barrier screening and outreach to communities of color as it pertains to lease up activities (initial lease up period, 1-year anniversary, 3-year anniversary);
 - Connection to services in the community (1-year lease-up anniversary)

IX. Reporting on the Implementation Strategy

Annual Report

HACC staff will prepare an annual report to the Housing Advisory Board and the HACC Board on the overall progress of the Local Implementation Strategy. This information will be made available to the public and interested stakeholders using a variety of strategies such as published reports, newsletter articles and website postings. The report will include information on committed and completed projects (e.g. project status, Bond funding amounts, total project cost, and units produced by unit size, type and income level served). The report will also include information on overall progress toward achievement of the framework goals.

Reporting is a critical step for HACC and Clackamas County to address the impact of our efforts. To that end, each development will be revisited and measured against its

outcomes to determine whether proposed levels of engagement and participation were met. Some of this information may be immediately available after project completion and some, like lease up and retention statistics may take a year or more to fully understand. The information gleaned will be valuable to our long term efforts throughout the life of the bond. It is HACC's intention to revisit these criteria, through annual reporting of the project sponsor, so that we can make periodic changes to our strategies under the LIS and to provide feedback and reporting to our residents, stakeholders, and Metro.

Reporting to Metro

HACC will submit annual reports to Metro in accordance with the Intergovernmental Agreement.

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Exhibit 1
OUTREACH & ENGAGEMENT REPORT

Clackamas County staff from Health, Housing & Human Services (H3S) and Public and Government Affairs (PGA) initiated outreach and engagement efforts around the Metro Affordable Housing Bond after voters approved the measure in November 2018. Building upon the county's strong relationships with local jurisdictions, affordable housing developers and service providers, county staff organized a series of engagement events targeting those respective stakeholder communities.

The county also contracted with a culturally specific provider, Unite Oregon, to partner on engagement efforts with low-income community members, communities of color, people with limited English proficiency, immigrants and refugees, and people with disabilities. Similar exercises and questions were used across these various engagement events, which reached a broad and diverse cross section of Clackamas County residents. A calendar of events and detailed summaries of each key engagement activity are provided below.

Summary of outreach event themes

Participants advocated for the need for affordable housing development for a diverse range of populations. This included people with disabilities (including those in recovery), seniors, families with children, and single individuals.

Key themes specific to what communities need for success emerged from engagement efforts across all stakeholder groups. Those included:

- The need for improved countywide access to multimodal transportation systems (especially in the more rural areas, but also increased connectivity between rural and urban areas)
- Increased affordable housing with access to services and jobs
- Improved access to health services (including mental health and addiction services)

Other recurring themes included safety and access to community amenities, such as grocery stores, green spaces, childcare and good schools.

Additional themes emerged specifically from conversations with communities of color, underrepresented and historically marginalized communities. Promoting opportunities for homeownership was a top priority, as was access to community spaces (community rooms in buildings, shared gardens, housing near parks or green spaces, community amenities, and the like). There was also a desire for access to free or low-cost educational opportunities, and family-friendly and culturally-specific activities. Detailed accounts of each engagement event are outlined below.

Calendar of engagement events

Outreach and engagement was primarily information sharing presentations to local jurisdictions and community fora. In May and June county staff and Unite Oregon held a series of engagement events at which extensive feedback was gathered, summarized further below. An online survey (English only) was also available for community members to anonymously fill out.

Informational Meetings Presenting Preliminary Bond Information to the Larger Community

11/28/18 and ongoing at monthly meetings	Discussion of Bond and implications with CC Affordable Housing and Homelessness Task Force
11/29/18	Presentation on homelessness and the Bond to Lake Oswego City Council and staff
12/6/18	Discussion at Milwaukie Housing Forum
1/8/19	Presentation to Gladstone City Council
1/8/19	Handout and brief information shared at Clackamas County’s Legislative Dinner
1/10/19	Presentation to the Court Appointed Special Advocates for Children

2/19-5/19	Worked with Community Alliance of Tenants and the Institute for Portland Metropolitan Studies on a community engagement plan for our Phase I project in Gladstone
2/26/19	Presentation to Jennings Lodge Community Planning Organization
4/14/19	Presentation to Milwaukie Housing Town Hall

Community Engagement Events to Solicit Feedback for LIS

Date	Event	Type	Number of Attendees
May 14th	Housing Forum	Targeted outreach to jurisdictional partners (including city officials, CPOs) and developers	56
May 15th	ClackCo Academy resident outreach	Community members (not targeted). Class made up of community members	19
May 23rd	Our Housing, Our Communities	General and Targeted outreach to diverse community members. Sought to engage non-english speaking and POC.	Approx. 40
June 11th	Homeless Solutions Coalition of Clackamas County (HSCCC) Community Meeting	Service Providers	Approx. 45
June 15th	Clackamas County Coordinated Committee (C4 Retreat)	Targeted outreach to Mayors, elected officials, Metro	53

June 20th	Our Housing, Our Communities	General and Targeted outreach to diverse community members. Sought to engage non-English speaking and POC. Discussion around equity.	52
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Targeted engagement to specific populations or organizations that serve them

Participating Populations	Focus Groups or Events
Low-income individuals	HSCCC, Unite Oregon meetings (5/23, 6/20)
Seniors	HSCCC, Unite Oregon meetings (5/23, 6/20)
Youth experiencing housing instability	United Oregon meetings (5/23, 6/20), and service providers of this population at HSCCC (6/11)
Individuals with physical disabilities	6/20 Unite Oregon meeting, and service providers of this population at HSCCC meeting (6/11)
Individuals with developmental disabilities (service providers)	HSCCC
Individuals with mental health concerns disabilities (service providers)	HSCCC
Individuals with addictions issues disabilities (service providers)	HSCCC
Individuals with limited English proficiency	Both Unite Oregon meetings (5/23, 6/20)
Immigrants and refugees	Both Unite Oregon meetings (5/23, 6/20)

Individuals with current or previous experience of housing instability	HSCCC (6/11) and Unite Oregon meetings (5/23, 6/20)
Residents of low-income housing	HSCCC (6/11) and Unite Oregon meetings (5/23, 6/20)
Justice-involved individuals disabilities (service providers)	HSCCC meeting (6/11)
Service providers for people on probation and currently incarcerated	HSCCC meeting (6/11)
Community Participation Organization (CPO) members	2/26 Jennings Lodge CPO meeting
Tribal community members	6/20 Unite Oregon meeting

Demographic information was requested at the 6/11/19 Unite Oregon engagement event but not all participants responded. Though age wasn't captured, older adults were in attendance and have attended several events thus far. Of particular interest has been the welcome attendance of non-native English speakers. The goal from our community engagement consultants, Unite Oregon, was to cast a wide net to attract as much feedback from as many different people as we could. Primary to that goal was to recruit people of color, immigrants, and refugees.

Not all who were in attendance have been willing to provide full demographic information but we have received direct feedback and information from: six Arab-Speaking immigrants/refugees; three Vietnamese speakers; 4 identifying as Spanish-speaking or Latino; an individual who identified as mixed race; one native Hawaiian.

Additionally, Unite Oregon provided outreach to people experiencing housing instability. Their feedback regarding increased information and resources relating to housing helped HACC shape the format of our engagement meetings.

Below is a list of jurisdictions we have had conversations with about the bond, or who have participated in a formal presentation.

- West Linn
- Tualatin
- Sandy
- Molalla

- Wilsonville
- Happy Valley
- Lake Oswego
- Canby
- Oregon City
- Milwaukie
- Gladstone
- Estacada
- Fire Districts
- Beavercreek
- Johnson City
- Rivergrove

Staff had informal listening sessions with the following nonprofit and for-profit developers and community groups. These discussions helped HACC staff frame topic areas and priorities within the LIS:

- Geller Silvis
- Strategies 360
- Sera Design
- Key Bank
- MHA of Oregon
- Milwaukie Floors
- Community Development Partners
- Rose Community Development
- Columbia Care Services
- Related Companies
- Todos Juntos
- Healthy Families Oregon, Clackamas County
- Community Development Partners (CDP)
- Community Partners for Affordable Housing (CPAH)
- Otak
- Columbia Care
- Bridge Housing
- Reach Community Development
- Northwest Housing Alternatives
- Northwest Family Services
- Pedcor
- Dominion
- Structure Development
- Related Northwest
- Portland Habitat for Humanity
- Proud Ground
- NEDCO
- Strategies 360

The “Our Housing, Our Communities!” engagement sessions held on May 23 and June 20 were conducted in partnership with Unite Oregon, whose staff did extensive community outreach to historically marginalized communities to invite attendees. Interpretation was available and actively utilized in Spanish, Vietnamese, and Arabic. Childcare and dinner were provided and gift cards were distributed to all community members in attendance. Events utilized interactive activities to capture in-depth feedback. Attendees represented recent immigrants, longtime residents, multiple nationalities, different age groups, and multiple ethnicities and races.

At the request of the community, the May forum included information about tenant’s rights and basic information about what affordable housing is before the bond portion of the event began. A participatory budgeting exercise was conducted at the June meeting. The two Unite Oregon meetings saw roughly 45 and 60 attendees, respectively.

Detailed Engagement Summaries

May 14th Housing Forum: Targeted outreach to jurisdictional partners and developers

This event was an opportunity to hear from city representatives and Community Planning Organizations (CPOs) as key stakeholders in successful implementation of the Metro Housing Bond in Clackamas County. Marketing strategies for this event included posting on the County Events Calendar, as well as email invitations sent to all elected city representatives, CPO Constant Contact List, as well as a list of active community developers. 56 people attended this event, which was held at Clackamas County's Development Services Building.

Participants identified a strong need for countywide public transportation improvements in order for affordable housing to be the most effective in serving the community, in addition to rent caps and a need for accessible wrap around services. In addition, fee waivers were recommended, as well as further community education around housing need. Participants also recognized the importance of community spaces such as gardens, parks, and community rooms.

What needs to be in place for housing to be successful?

- Countywide public transportation
- Rent caps
- Wrap around services
- Fee Waivers
- Education on housing need
- Community Spaces (shared gardens, parks, community rooms, etc.)

When looking at what populations are in greatest need of affordable housing, participants identified seniors and older adults, Workforce community members, and people with mental health challenges. Other populations identified were people with other types of disability (including people in recovery) and immigrants.

What population in your community is in greatest need of housing?

- Seniors and older adults
- Work Force
- People with Mental Health Challenges
- People with Disabilities
- People in Recovery
- Immigrants

Improved access to multi-modal transportation (including accessible public transportation). Other top 5 needs included access to affordable childcare, health services, and housing that includes supportive services.

What is your community's greatest need?

- Affordable housing
- Transportation
- Affordable childcare
- Access to Health Services
- Supportive Housing

When asked about values that should shape the County's approach to housing development, participants discussed the importance of opportunity areas, mixed income housing, increasing opportunities for homeownership, and providing quality housing. Racial equity was also stressed as a crucial part of smart development policies and practices. It was expressed that leadership needed to keep promises to voters around affordable housing development, by getting it done on an efficient timeline.

May 15th Input from ClackCo Academy participants

ClackCo Academy gives members of the community the opportunity to learn more about county services and programs. This was a closed group, with direct email invites sent to ClackCo Academy participants. Members must live, work, own a business, or work full time in Clackamas County. Space is limited to 25 participants, with an additional five seats reserved for youth ages 16-20.

While the class is made up of community members, this engagement event was not open to the larger community.

What is your community's greatest need?

- Access to Jobs
- Access to services
- Transportation
- Affordable Housing

What population in your community is in greatest need of housing?

- Families with children
- People with disabilities
- Houseless community members
- Very Low Income
- Single Parents

What needs to be in place for housing to be successful?

- Access to multi-modal transportation options (including walkable streets)
- Access to services
- Access to jobs, training/adult education
- Public space/place-making, green space
- Government support and policy evaluation (land use, zoning, etc.)

May 23rd Our Housing, Our Communities!

This was the first event held in partnership with Unite Oregon. Conducted in the evening at the Wichita Center for Family and Community in Milwaukie, this event began with presentations about renters' rights and housing resources, a presentation about the Affordable Housing Bond, and ended with an engagement exercise. Food, childcare, and interpretation in three languages (Spanish, Vietnamese, and Arabic) were provided by Unite Oregon.

What needs to be in place for housing to be successful?

- More food banks nearby
- Gas heating instead of electric, because of the lower utility bill costs associated with gas heat
- Nearby community/cultural centers, as well as parks and natural areas
- Good parking
- High-quality schools
- Accessibility (both of housing and the surrounding neighborhood) for residents with
- Accessible transportation, especially public transit
- Community gardens
- Family-sized housing (3+ bedrooms) for larger families

What population in your community is in greatest need of housing?

- People with disabilities
- Seniors and older adults
- People in recovery
- Low income families
- Single parents
- Domestic violence survivors
- Students
- Larger families
- Families with young children

What is your community's greatest need?

- Transportation: Frequent bus service; affordable housing near transit stations; accessible
- Food: housing close to shopping centers; access to healthy food like co-ops like in Portland; free food resources for people with low incomes; access to community gardens to grow own food
- Health services: proximity to hospitals and clinics
- Affordable housing: cheaper rents for families with children; cheaper rent in general
- Other: child care; educational programs; tutoring or similar activities for children; security and safety at schools; proximity to playgrounds; low-cost home-buying opportunities;

safe and friendly environments; close to stores/shopping opportunities; day care services; space to own a pet; well-ventilated housing units

Attendees gave a list of locations where they would like to see affordable housing in their communities:

- Oak Grove, especially near Fred Meyer
- Milwaukie
- Wilsonville, near major employment areas

June 11 Homeless Solutions Coalition of Clackamas County (HSCCC) Meeting

The HSCCC is a grassroots coalition comprised of more than 200 citizens, agency staff, government officials, church affiliates, and community members in Clackamas County. The mission is to find compassionate and respectful solutions to homelessness through community partnerships. On June 11th, members of HSCCC were invited to provide input on how they think the Metro Affordable Housing Bond dollars should be spent in Clackamas County.

What needs to be in place for housing development to be successful (amenities, services, etc.)?

- Need for more accessible case management and other supportive services.
- Access to resources including child care and schools, jobs and training/placement, food.
- Access to mental and physical health services
- Access to multi-modal transportation options
- Place Making/Public Spaces (community building, public art, places for community empowerment)

During the dot voting, the following top 5 were prioritized (in order from most votes to least):

1. Support services
2. Access to transportation (walking, bike, bus, car)
3. Access to schools/childcare
4. Close access to services (medical, dental, etc)
5. Green Space/Play Place

Help us shape our county values around housing.

- Compassion, understanding acceptance. Educating community
- Equity and Inclusion
- Trauma Informed approach to providing services
- Safety
- Community oriented spaces and activities. Community participation
- Sustainability (social, environmental, etc.)
- Accessibility
- Respect, dignity, self-determination, and empowerment

- Provision of and access to support services
 - Education and youth services

During the dot voting, the following top 5 were prioritized (in order from most votes to least):

1. Compassion/understanding. Dignity, respect
2. Equity
3. Trauma Informed
4. Community Education
5. Access to Resources

Additionally, inclusion, sustainability, safety, and young children were called out as important priorities. Participants also pointed to the importance of community self-determination and empowerment as important to sustainable development practices, and expressed an interest in seeing more and improved community spaces.

What is your community's greatest need?

Participants were asked to provide input on the following predesigned categories: Transportation, Access to Health Services, Affordable Housing, access to food, and other. While a majority of participants did not put their city on a sticky note, the following were some of the areas identified:

- Transportation
 - Oregon City rural areas
 - Rural areas (county wide)
 - Milwaukie
 - Oregon City
 - Wilsonville
- Access to Health Services
 - Oregon City
 - Canby
 - Aurora
- Affordable Housing
 - Milwaukie/Oak Grove
 - The Whole Portland Metro Area
 - Milwaukie
 - Happy Valley
 - Oregon City
 - Wilsonville
 - Estacada
 - West Linn
 - Sandy

- Access to Food
 - Milwaukie

- Other
 - Walkability
 - Access to essential services
 - Better understanding of homeless by community
 - Peer support services
 - Access to affordable childcare
 - Access to good jobs, wages, and training
 - LGBTQ+ resources
 - Youth resources
 - Financial education

During the dot voting activity, the following 7 were prioritized as greatest community needs: (in order from most votes to least):

1. Affordable Housing
2. Mental Health & Physical Care
3. Transportation
4. Substance Abuse/Addiction Services
5. Support Services
6. Community Outreach/Awareness
7. Child Care

What population in your community is in greatest need of housing?

Of the predetermined categories, participants prioritized the following (from most to least votes):

1. People with mental health challenges
2. People in recovery
3. People with disabilities
4. Seniors and older adults

The largest number of votes, however, were in the “Other” category. Some of the greatest needs identified included:

- Single adults
- Single parent households
- Youth
- LGBTQ+ community members
- Families with children
- Veterans
- Those with criminal backgrounds and those recently incarcerated
- Houseless community members
- Domestic Violence survivors

- People of Color

During the dot voting activity, the following 8 were prioritized as greatest needs: (in order from most votes to least):

1. Mental Health Challenges
2. Families with children (ranked top along with Mental Health Challenges)
3. People in recovery
4. POC/LGBTQ+
5. Young people (teens and 20s)
6. Low Income
7. People with disabilities
8. Seniors/Older Adults

When asked how people receive their housing news, participants answered as follows:

- Social Media (Twitter, OCCH Chat, Next Door, MACG, etc.)
- Email or E-Newsletter
- Community Group/Meetings
- Government agency communications
- Networking
- Non-profits, day centers/shelters
- Libraries
- Health clinic communications

June 15th Clackamas County Coordinated Committee (C4) Retreat

The Clackamas County Coordinating Committee (C4) meets to provide coordination and cooperation between jurisdictions within Clackamas County and to form unified positions on land use and transportation plans. Membership is comprised of elected officials from Clackamas County, cities, representatives from unincorporated communities, and representatives from transit, sewer, water, and safety districts. At its June retreat, County staff presented the C4 with information on the Affordable Housing Bond and conducted a similar engagement activity to those described above. Responses listed below are in order of most to least.

What needs to be in place for housing development to be successful?

- Transportation access
- Services nearby
- Meaningful connections to existing neighborhood
- Green spaces

What population in your community is in greatest need of housing?

- Low income households
- Families with children (especially single parent households)
- Single adults experiencing homelessness

- People with behavioral health needs

What is your community's greatest need?

- Access to affordable housing
- Access to services (including health-both mental and physical)
- Improved access to transportation
- Access to jobs and job support/training

Help us shape our county values around housing.

- Commitment to mixed income integration
- Educate community (combat stereotypes, build support and acceptance)
- Living wages/access to employment
- Housing First/low or no barrier housing

June 20th Our Housing, Our Communities!

At the second engagement meeting in partnership with Unite Oregon, we began by debriefing participants about what we had discussed in May. We then provided a short overview of local housing resources with an opportunity for participants to ask questions. Next, we provided a longer training on the concept of participatory budgeting, and then closed with a discussion of how participants define racial equity in affordable housing.

Breakout groups in the following discussion provided feedback on their perspective in what racial equity means in terms of housing. They reported the following:

- Public housing as a utility, not as an investment; a way to start place-making.
- There are lots of subsidies for owners but not renters
- Ownership should occur through multiple ways
 - Low income assistance to ownership
 - Expand down payment assistance
- Barriers to contracting
- Vietnamese participants shared a model of peer-to-peer lending in Vietnam to finance housing. Could there be a revolving fund to finance home purchases at reduced interest rates? How can affordability be passed on to the next owners?
- Clackamas County should hire within the community to build housing with an emphasis on hiring workers connected to families that would be housed.
- Housing opportunities could be prioritized to first-generation owners.
- Buy properties and housing now while it is less expensive and then figure out how to make it affordable to low-income buyers later. In other words, land bank if necessary.

Metro Bond Survey Results

From June 4th to June 26th the County hosted an online survey about the Affordable Housing Bond on its website. Participants were asked to imagine the entire county, and think of a place where they would put new affordable housing before answering the questions below.

Why did you pick that location for affordable housing development?

1. Bus/Max
2. Affordable Grocery Store
3. Job
4. Food Bank, social service agency, other service
5. Where I live now (in my community)
6. Local Park/open space/trail

What are some other things about the area that you picked?

1. Safety
2. Open space/available land/rural/away from the city
3. Accessibility by car (including access to freeways, drivability, parking)
4. Central location (accessible to amenities, groceries, services, near city center etc.)
5. Accessible transportation options, and accessible green space
6. Access to jobs/employment opportunities

What are the biggest challenges people face when trying to find a place to live?

1. Rent is too expensive
2. Move-in costs are too expensive
3. Strict application and screening fee (income requirements, criminal and credit reports, rental history, etc.)
4. Distance from job, school, friends, family, school, etc.
5. Doesn't accept pets
6. Not enough space for a family

How do people find affordable housing?

1. Family/Friends
2. Craigslist
3. Social Media
4. Social Services Providers
5. 211

What do you think are the biggest challenges people have keeping their housing?

1. They can't afford to pay rent
2. Lack of good transportation options
3. The apartment isn't safe or habitable
4. The apartment isn't located where they want to live
5. Not enough support services provided or near the apartment

What types of services, programs, and/or support are needed to overcome these challenges?

- Quality affordable housing county wide
- Accessible support services (including addiction services, mental and physical health services)
- Better multi-modal transportation infrastructure and services
- Access to jobs and job training/employment services
- Rent control, government and stakeholder buy-in/support

Exhibit 2
FRAMEWORK TRACKING WORKSHEET

	Metro Bond	% of Total
Clackamas County Allocation	\$116,188,094	100.0%
<u>Utilized to date</u>	\$2,700,000	2%
18000 Webster Road		
Balance Remaining	\$113,488,094	98%

	Unit Production Targets			% of Total
Clackamas County	Total 812	30% AMI 333	Family size 403	100%
18000 Webster Road SRO	45	45	0	6% of Total units; 14% of 30% AMI
Balance Remaining	762	288	0	94%

Attachment 1
Clackamas County Eligible Bond Placement per the Urban Growth Boundary (UGB)





