

**SCHRUNK RIVERVIEW TOWER APARTMENTS
TENANT RELOCATION PLAN
November 9, 2018**



Schrunk Riverview Tower Apartments, owned and managed by Home Forward, is an eleven-story public housing apartment community with 118 one-bedroom homes located at 8832 North Syracuse Street, Portland, Oregon. The community serves seniors and persons with disabilities. Home Forward has a special responsibility to those who encounter barriers to housing because of income, disability or special need. Home Forward continues to promote, operate and develop affordable housing that engenders stability, self-sufficiency, self-respect and pride in its residents and represents a long-term community asset.

The property currently consists of 114 occupied one-bedroom units (four vacant) serving tenants with the average age of 60 years old, including adults with special needs. The completed resident assessments provided demographic information consisting of the following breakdown (approximate), 73% Caucasian, 20% African American, and less than 7% reporting other ethnicities. Home Forward has hired Epic

Land Solutions, Inc., hereinafter known as “Epic”, a local relocation consulting firm, to assist with the relocations required for the rehabilitation.

UNIFORM RELOCATION ACT, SECTION 104(d), AND CHAPTER 2 REQUIREMENTS

Because of the federal funds in use for the renovation project at Schrunk Riverview Tower Apartments, all relocation activities are to adhere to the Uniform Relocation and Real Property Acquisition Act of 1970, as amended (URA) as well as Section 104(d) and HUD Handbook 1378 temporary requirements as stated in Chapter 2.

RELOCATION REQUIREMENTS

Relocation will be required for the renovation of this building. All tenants will be temporarily relocated to functionally equivalent/suitable housing for approximately five to nine weeks. All tenants who meet the income certification requirements have been offered the right to return to the building after the renovation. Currently, eight tenants may not income-qualify, this will be discussed in further detail in the permanent relocation section of this plan.

RELOCATION PROCESS

The relocation process is divided into two phases: Phase I focused on preparing and delivering resident notifications; conducting household assessments; procuring professional moving companies and other contractors to address resident needs; and, providing ongoing information to residents pertaining to their individual relocation plans. Information gathered during Phase I would lend the necessary information to develop a comprehensive plan to address resident special needs during the relocation process and secure extended stay temporary housing during the construction work.

Phase II of the relocation process focusses on executing the relocation plan developed during Phase I, herein detailed.

The Project team has provided a revised construction plan which includes both, the plumbing work as well as the seismic improvements. The relocation team has reviewed and assessed the construction schedule and is prepared to meet the needs of the renovations at hand.

Schrunk Riverview Tower Apartments is comprised of two “towers”, the “short tower” is six stories tall and the “tall tower” is eleven stories tall. Units 1-6 are in the short tower and units 11-18 are in the tall tower. This will require temporarily relocating the units in

the short tower, 28 tenants in total. The short tower also has the kitchen, community room, and offices. The process of clearing the short tower will be at the end of the project resulting in some households relocating twice due to the seismic work planned at the beginning of the project. The construction team will do both the planned stack construction work in the tall tower and seismic upgrades simultaneously, which include work on the short stack prior to their planned plumbing stack work. This approach requires the tenants in the short tower to be off-site for a longer duration but, for some units, it eliminates the potential double moves for these tenants.

The various levels of work, either per floor for the seismic improvements, or per stack for the plumbing stack, as well as the timing of each, create at least 6 levels of temporary relocation. Where 56 households will relocate temporarily for 8 weeks, 29 households will relocate temporarily for 10.5 weeks, 4 households will relocate temporarily for 11.5 weeks, 15 households will relocate for an average of 10 weeks, 7 units will temporarily relocate for 11 weeks, and, 2 households will relocate temporarily for 16 weeks. The cost summary of what this involves is described in Exhibit E-1 of this document. Although this durations are long, with this plan there are only 15 tenants who will need to be moved twice versus all 30 households affected by the seismic work. Although tenants are scheduled to be offsite longer with this plan, with higher costs in accommodations, there are anticipated cost savings due to the lower number of planned moves and correspondence. Additionally, lowering the number of daily moves decreases the level of traffic created by movers, packers and residents moving, creating a more stable environment for other residents remaining within the building while construction and relocation are in process.

As the construction continues, every effort will be made to streamline the number of moves and the extended stay durations, in order to better accommodate resident special needs and concerns, in an attempt to mitigate resident anxiety and to bring them back home as soon as possible.

RELOCATION INTERVIEWS, ADVISORY SERVICES AND ACCOMMODATION NEEDS

Epic has performed initial tenant relocation interviews and is continuing to collect household and personal information, including documenting any special needs. See Enclosures for sample Questionnaire. Epic will provide relocation advisory services to tenants. Home Forward will ensure regulatory compliance through the rehabilitation project.

For tenants with special needs, Home Forward and Epic will work together to ensure these tenants relocate to suitable units that meets their special accommodation need, such as being located near transportation or assistance providers, or accessible/single floor units.

Epic has carefully assessed the needs of each tenant. Approximately, 18 percent of the tenants have some form of disability requiring a medical modality, such as a walker or wheelchair to assist them with their activities of daily living. Given this information and the needs of the tenants, Epic has identified several different measures to address the medical needs. Epic will work with construction and Home Forward to accommodate the tenants throughout the process. Epic and Home Forward have developed a detailed plan to meet the specific needs of the tenants and will make every effort to advise and assist each tenant throughout the project.

Tenants will move from the project site to extended stay hotel units in the area. The relocation team will work with the tenants to facilitate the temporary move to the temporary dwellings. The tenant belongings will be taken by the moving crew to their storage facility. Tenants will not have access to this storage facility. The relocation team will stress the importance of taking all necessary items with them to the temporary dwellings. Epic will work with management at the extended stay hotels to ensure accommodations are made for the tenant's specific needs; ADA units are available when needed. Apartments are also being considered as a temporary dwelling. If apartments are utilized by the relocation team, tenant belongings will be going with the tenant to the off-site dwelling.

TENANT MOVES AND PAYMENTS

Epic has identified a moving company experienced in moving senior and disabled tenants. The moving company will provide packing materials and pack the tenant's belongings for their temporary relocation. The tenants will then be moved to their temporary unit for the duration of the renovation. Home Forward/Epic will coordinate the moves on behalf of the tenants, provide notices, and assist the tenants with transferring their utilities, as needed. In addition, Epic will provide advisory services for the tenants including outreach to case managers of tenants as needed. The relocation team will also coordinate with the tenants and Home Forward to document and reimburse any additional move related costs that are incurred as part of the project, such as transportation costs. Epic will ensure that these expenses are actual, reasonable, and necessary prior to submitting claims for Home Forward's review and payment.

Home Forward will cover moving expenses to and from the temporary locations and payment of increased housing costs during the period of relocation. In accordance with HUD handbook 1378, any and all telephone, cable, or internet services at the displacement unit will be transferred. Home Forward and Epic will collaborate to reimburse the tenant for costs involved in transferring existing services, if any. These include covering moving expenses to and from the temporary location, as well as any applicable fees. Following the renovation, tenants will be relocated back to a functionally equivalent unit at Schrunk Riverview Tower Apartments.

For households that do not qualify for relocation benefits, Home Forward will provide information on identifying suitable units and pay for moving costs. Such ineligible households are defined as “Persons Not Displaced” per 49 CFR 24.2(a) (9) (ii).

TEMPORARY RELOCATION LOCATIONS

Relocation efforts are focused on temporarily relocating the tenants to successfully meet the construction schedule while providing clear communication and support, especially to those with serious needs. Epic has performed housing research of the surrounding area to find suitable/functionally equivalent units during the renovation. Research focused on locating replacement housing in North Portland as near as possible to the project site, the stated preference of most tenants at Schrunk Riverview Tower apartments. In addition, special circumstances and needs have been accommodated to the greatest practical extent and within the regulatory guidelines.

Currently identified offsite accommodations include the following sites:

EXTENDED STAY RELOCATION SITE #1: RESIDENCE INN BY MARRIOTT PORTLAND NORTH/DOWNTOWN/CONVENTION CENTER.



The Residence Inn by Marriott Portland North Complex is located on 1250 North Anchor Way and is approximately 4 miles from the subject. Great efforts were made in prescreening complexes for functional



equivalency and decent, safe and sanitary standards. Each unit has a kitchen, washer/dryer, cable tv, and several additional amenities including allowing pets. The complex offers onsite parking, community rooms, and a fitness center. There are multiple units available at this location, including ADA units. This site’s proximity,

capacity, and ADA compliant rooms may make this an ideal replacement site to suit the unique needs of the tenants of Schrunk Riverview Tower Apartments.

EXTENDED STAY RELOCATION SITE #2: THE OXFORD SUITES.



The Oxford Suites Portland – Jantzen Beach Complex is located at 12226 N Jantzen Drive, Portland, OR 97217. The complex is located approximately 4.2 miles from the subject, is



functionally equivalent to Schrunk Riverview Tower Apartments and meets all DSS requirements. Like the Residence Inn Portland North, this complex is pet friendly. There are multiple units available at this site and the site does offer shuttle services.

RELOCATION SITE #3: THE UNION AT ST. JOHNS APARTMENTS.

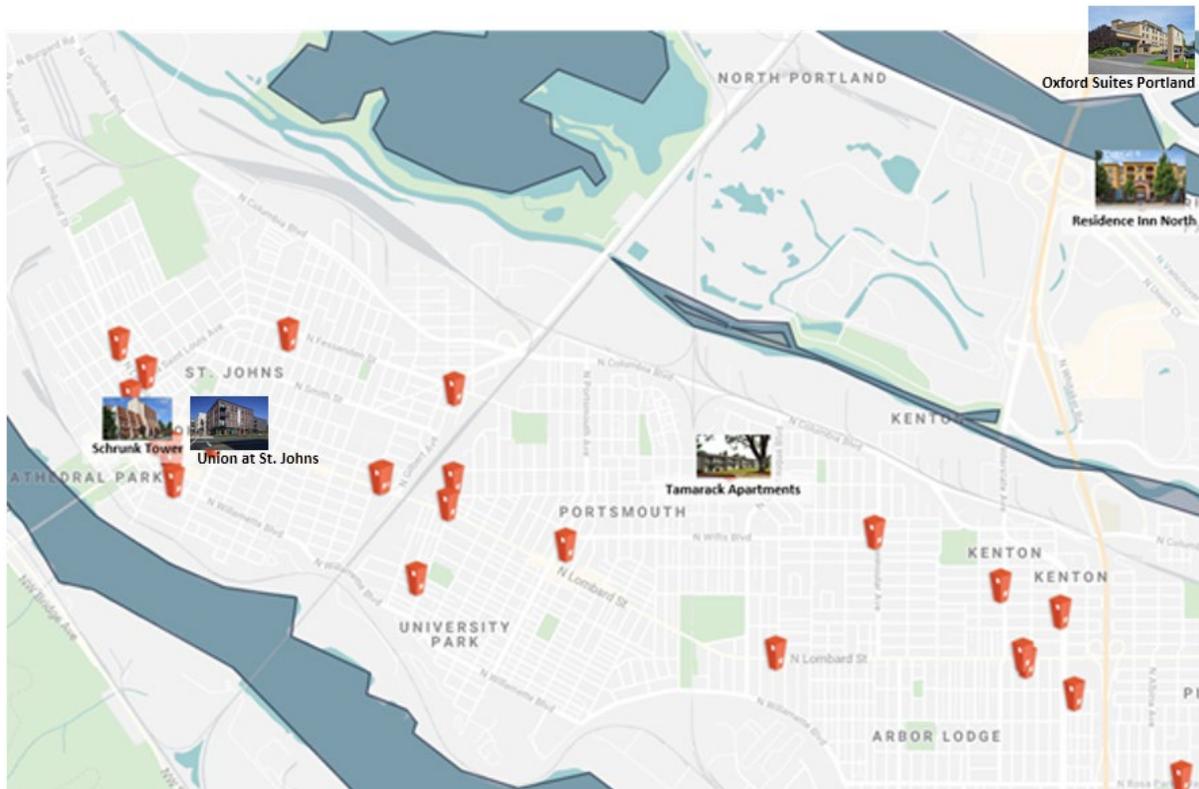
The Union at St. Johns Apartment is located 0.4 miles from the subject. Great efforts were made in prescreening complexes for functional equivalency and decent, safe and sanitary standards. The Union at St. Johns is a newly constructed building with controlled access offering a variety of amenities. Each unit has pre-wired utilities, a washer and dryer, spacious floor plans with stainless steel appliances. The complex offers bike parking, community rooms, is pet friendly, and has a fitness studio. The Union at St Johns is located at 7428 North Charleston Ave in north Portland. There are currently units available at this location. This site’s proximity advantages (distance to shops, public transportation, etc.) may make this an ideal replacement site to suit the unique needs of the tenants of Schrunk Riverview Tower Apartments should the need for master leasing apartments arise.



RELOCATION SITE #4: EXISTING HOME FORWARD VACANCIES

Epic and Home Forward are undergoing a comprehensive assessment of the current inventory and future vacancies at all nearby Home Forward owned and/or managed properties. Initial conversations with tenants have indicated that there is a large demand for temporary or one way moves to other Home Forward owned properties. These requests will be considered and discussed with the project team. All replacement and temporary dwellings will be functional equivalent and meet decent, safe and sanitary standards.

The map below shows a sampling of options described above:



NOTICES

Home Forward and Epic are completing all noticing and relocation file recordkeeping. Notices have been and will continue to be hand delivered and/or sent by certified mail in a timely fashion. If the household is non-English speaking, the notices will be provided in English along with a summary in the appropriate language, including informing tenants that direct verbal translation of the notices are available upon request. If the household is unable to read, a relocation service provider will personally explain the notices to the tenant with the aid of an interpreter as needed. Translation of materials beyond those provided in Spanish by HUD will be completed by a translation service provider. The relocation team will coordinate this effort. Relocation documentation includes:

General Information Notice

In the spring of 2018, Home Forward property management provided all General Information Notices (GIN) to the tenants. Subsequent noticing was performed to ensure all tenants received the notice. The GIN was also discussed in the assessment

interview. Copies of the General Information Notice have been placed in tenant files.

Move In Notices

Home Forward/Property management is monitoring all tenant move-ins to assure that new tenants receive and sign notices informing them that they are moving into a renovation project. The tenant will be provided with the appropriate notice of their benefits. Tenant relocation files will be created for each new tenant.

Move Out Notices

To the extent possible, all tenants who notify property management of an intent to vacate will be asked to sign a move out notice and to state the reason they are vacating the property (e.g. voluntarily, for personal reasons, etc.).

Notice of Non-Displacement

A Notice of Non-Displacement will be hand-delivered to all tenants during the tenant assessment period taking place between October and November 2018.

Move Day Notice

Tenants will be given reasonable advance written notice by hand-delivery or certified letter of the date of the planned move, unless the tenant, Home Forward and/or Epic agree that a shorter notice time is acceptable. This will occur prior to the move out of Schrunk Riverview Tower Apartments, and prior to return to Schrunk Riverview Tower Apartments. Epic will provide reasonable advance written notice of: (a) the date and approximate duration of the temporary relocation (not to exceed one year); (b) the address of the suitable, decent, safe, and sanitary dwelling to be made available for the temporary period; (c) the terms and conditions under which the person may lease and occupy a decent, safe, and sanitary dwelling in the building/complex upon completion of the project; (d) the cost involved in their move and any applicable out-of-pocket expenses which will be reimbursed; and (e) the advisory services which will be available to them.

Move In/Move Out Inspection Form

At the time of move-in, at both the temporary dwelling and when tenants return to a renovated unit at Schrunk Riverview Tower Apartments, the tenants will coordinate with Epic's relocation agents on the day of their move to ensure that the unit meets the requirements of being Decent, Safe and Sanitary. In addition, the unit will adhere to the functionally equivalent/suitable size unit for the tenant. The goal is to provide the tenant with like amenities as found in the subject unit that they currently occupy at Schrunk Riverview Tower Apartments. At this time, a Move In/Move out Inspection Form will be

completed. If needed, Epic can coordinate with a representative from HUD to ensure that the off-site locations meet HUD standards.

APPEALS PROCESS

Home Forward and Epic will follow the appeal process outlined below, and will communicate this process to tenants at community meetings and in interviews:

- All persons will have the right to appeal a determination made by Home Forward and/or its Relocation Service Provider regarding the eligibility for relocation assistance, amount of the relocation payment, adequacy of referrals to comparable units, or any other moving claims.
- Home Forward shall ensure that all tenants are advised of their right to appeal, their right to review records, and their right to have a legal representative (at their own expense).
- Appeals may be made to Home Forward, 135 SW Ash Street Portland, Oregon 97204. Appeals may not be assigned to the same person who made the initial determination being appealed. Written determinations (and translations as appropriate) will be provided in a timely manner.

Tenants who disagree with the agency's determination may further appeal the agency determination with the local HUD office, or pursue their appeal through the courts.

PERMANENT RELOCATIONS

Currently, there is a potential for eight permanent relocations during the project. For households who fall outside of the income levels for tax credit rents, if they choose, Home Forward and the relocation team will provide the tenant with the appropriate relocation benefits according to the URA guidelines. More investigation is needed to determine if permanent relocation will be a part of this project. If determined, permanent relocation benefits consist of:

- Providing the household with a General Information Notification (GIN);
- Providing tenant(s) with relocation brochure and review of brochure;
- Securing permanent comparable housing appropriate to resident needs and eligibility;
- Advisory Services;
- Developing and completing a housing study to be approved by with Home Forward/oversight;

- Inspecting potential replacements sites to ensure that decent, safe and sanitary conditions;
- Providing tenant with Notice of Eligibility and 90-day minimum assurance;
- Coordinating off site residency;
- Filing relocation claims for the tenant(s), as needed; and
- Expenses.

AVOIDING ECONOMIC DISPLACEMENT

Home Forward is responsible for assuring that any rent increases do not cause economic displacement for those tenants eligible for URA. Home Forward will work closely with internal property management staff before, during, and for one year after the rehabilitation is complete to comply with URA requirements.

RECORD KEEPING

All pertinent records shall be retained for the period specified in the applicable program regulations, but no less than three years after the latest of: (1) The date by which all payments have been received by persons displaced for the project and all payments for the acquisition of the real property have been received; (2) The date the project has been completed; (3) The date by which all issues resulting from litigation, negotiation, audit, or other actions (e.g. civil rights compliance) have been resolved and final action taken; or (4) For real property acquired with HUD funds, the date of final disposition (24 CFR 84.53 and 85.42).

All relocation documents will be made available to oversight in hard or electronic copy at the following three-time frames: upon request, upon the final move in of all temporarily relocated tenants, and upon the final installment of replacement housing payment to any permanently relocated tenant.

CLAIMS

Specific payments to tenants, including payment for tenant moves, or reimbursement of out-of-pocket expenses will be closely tracked throughout the project. Claims will be submitted for review and approval. Upon approval, they will be paid in a timely manner. Records will be kept of all payments and claims made throughout the project.

RELOCATION BUDGET

Exhibit E-1 describes a budgetary estimate of all programmatic expenses associated with the temporary move of all temporary displacees of Schrunk Riverview Tower Apartment, apart from fee and labor allocations associated with the HUD staff, Home

Forward staff, and management staff. Home Forward/Epic have accounted for the 115 units currently occupied and meeting income certification requirements. This estimate does not include the possibility of providing relocation assistance to any of the eight potential units not currently meeting income certification requirements who opt for permanent relocation assistance. The budget addresses the anticipated rents for both Home Forward properties and market rate rents and/or extended stays typically found in the North Portland/St. Johns area.

CONCLUSION

Home Forward has followed, and will continue to follow, required procedures at Schrunck Riverview Tower Apartments in accordance with the URA, Section 104d and HUD Handbook 1378, Chapter 2 as part of this temporary relocation process. The Relocation Plan for Schrunck Riverview Tower Apartments ensures that tenants are aware of their benefits and properly noticed.



Page Intentionally Left Blank – Please see Attached Resident Relocation Services
Cost Summary - Schrunk Apartments

EXHIBIT E-1

Resident Relocation Services Contract - Exhibit II - Cost Summary - Schrunk Apartments

SCHRUNK TOWERS	Entity / Firm / Location	Phase I Estimated Costs					Phase II - Estimated Costs		GRAND TOTAL
		# of Units	Unit Size	Unit Pricing	Phase I Total	Additional Explanations/Comments	Phase II Total	Additional Explanations/Comments	
Project Management/Client Meetings		12		\$200	2400		2400		4,800
Resident Assessment/ File Management		115	each	\$2,000 per unit	230,000		187,500	Accounts for additional move coordination and communication due to seismic activity. Accounts for additional efforts needed due to changes in construction schedule, providing onsite staffing hours (TBD), securing and utilizing extended stay accommodations. Additional interaction and resident assessments plus file management during actual construction/moves. Assumes 130 temporary relocations, assumes 15 Tenants will need to be relocated twice due to seismic upgrades (30 total moves). 110+5= 115 (Actual number of tenants to be relocated) Also accounts for second move due to seismic activity	417,500
Packing Supplies/Packing Assistance		110	each	\$500 per unit	55,000		6,250		61,250
Temporary Storage		78	each	\$120 per unit, per month (6mos each)	56,160		26,640	78+37 = 115 (Actual number of tenants to be relocated). Assumes each tenant will only need one storage vault not to exceed 6 months.	82,800
Moving Costs - Full move		115	1 BDRM	\$1,850 per apartment, round trip	212,750				212,750
Moving Costs - Partial Move		0	1 BDRM	\$1,500 per apartment, round trip		Assumes full moves	22,500	Accounts for second move due to seismic activity (15)	22,500
Extended Stay		17	1 BDRM	\$6,000 per unit for 5 week period	102,000		537,600	1BDRM for 8 weeks (56 Units) = \$9,600	
							365,400	1BDRM for 10.5 weeks (29 Units) = \$12,600	
							55,200	1BDRM for 11.5 weeks (4 Units) = \$13,800	
							180,000	1BDRM for 10 weeks (15 Units) = \$12,000	
							38,400	1BDRM for 16 weeks (2 units) = \$19,200	
							92,400	1BDRM for 11 weeks (7 Units) = \$13,200	
							(102,000)		1,167,000
Resident Transportation Allowance		116	1 BDRM		47,400	Allowance includes costs related to: Resident Transportation/Shuttle for activities during temp relocation and, resident transportation to/from hotel and/or modular unit Resident transportation may vary in method, i.e. taxi cabs, Uber/Lift, Trimet pass, gas cards, etc.	66,246	Allowance includes costs related to: Accounts for additional allowance due to unavailability of modulars units, transportation allowance with extended stay units. Accounts for second move due to seismic activity	1,269,000
Permanent - Full Move		0	1 BDRM	\$925 per apartment					113,646
Pest Mitigation Costs		116	1 BDRM	\$150 per unit, per treatment	17,400	Should include pre & post treatment inspections Additional Pest Mitigation Costs on Modular units below on Exhibit - III			17,400
Misc. Costs, If Any Postage, Mileage		TBD TBD		Direct cost only for reimbursables			26,088	Estimated expenses, mileage, postage, utility reimbursement, laundry reimbursement, Assumes weekly vouchers will be available for onsite laundry, this will be coordinated with the extended stay management.	26,088
Total Schrunk Relocation Services Costs					723,110	Total Relocation Services Contract - Phase I	1,504,624	Total Relocation Services Contract - Phase II	2,227,734
Overall Project Contract Costs For Both, Schrunk and Tamarack									3,936,323