

TAMARACK APARTMENTS
TENANT RELOCATION PLAN
November 9, 2018



Tamarack Apartments, owned and managed by Home Forward, is a public housing community with 120 one, two and three-bedroom homes, including six that have physical accommodations for accessibility located at 4111 N Alaska Street, Portland, Oregon. There are 47 one-bedroom units, 59 two-bedroom units, and 12 three-bedroom units. The Tamarack Apartments are located in the Portsmouth neighborhood of North Portland and offer park-like grounds, a playground, laundry facilities, and some on-site parking. Homes in this community feature patios and external storage spaces. 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 (six vacant) serving mainly families. The completed resident assessments provided demographic information consisting of the following breakdown (approximate), 32% Caucasian, 33% African American, 29% Hispanic or Latino, and less than 6% 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 Tamarack 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 eight weeks. All tenants who meet the income certification requirements have been offered the right to return to the building after the renovation. Currently, only six tenants have not income-qualified, 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.

Temporary relocations will occur over several phases. Construction of these phases will occur by building, starting with Building 1 and ending with Building 13. Each phase of construction will require a move out and a move back of an entire building ranging from 6-12 units. All tenants will move to a temporary location prior to the start of renovations and return to a renovated unit upon completion of construction of their unit. Construction will be staggered, with generally two buildings to be renovated at a time. This phased construction will require as many as 24 tenants to be out of their apartment at any one time.

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 review accommodations and work together to ensure these tenants relocate to suitable units that meet their special accommodation need, such as being located near transportation or assistance providers, or accessible/single floor units. For households who have school-aged children Epic will work with the local school in determining transportation needs and will create avenues to ensure school attendance.

Epic has carefully assessed the needs of each tenant. Approximately, 25 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

dwelling. 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

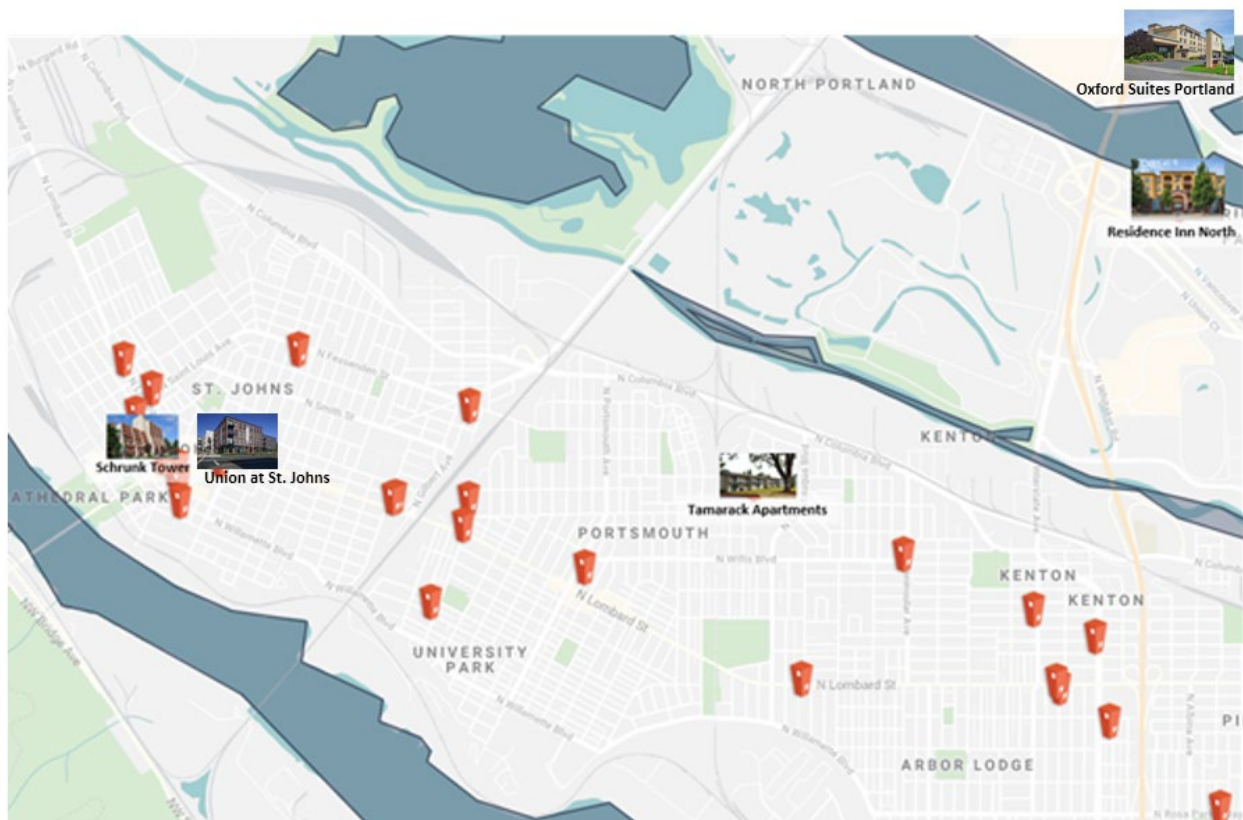
Epic has identified a moving company experienced in moving senior and disabled tenants. The moving company will provide packing materials and pack the tenant's belongings for their temporary relocation. The tenants will then be moved to their temporary unit for the duration of the renovation. Home Forward/Epic will coordinate the moves on behalf of the tenants, provide notices, 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 Tamarack 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 Tamarack 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

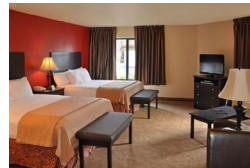


equivalency and decent, safe and sanitary standards. Each unit has a kitchen, washer/dryer, cable tv, and several additional amenities including allowing pets. The complex offers onsite parking, community rooms, and a fitness center. There are multiple units available at this location, including ADA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

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 information 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. Epic has identified a translation service in the area ready to be of assistance when needed. 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 Tamarack Apartments, and prior to return to Tamarack 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 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 Tamarack 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 Tamarack 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 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 six 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

The following is a budgetary estimate of all programmatic expenses associated with the temporary move of all temporary displacees of Tamarack Apartments, apart from fee and labor allocations associated with the HUD staff, Home Forward staff, and management staff. Home Forward/Epic have accounted for the 114 units currently occupied and meeting income certification requirements. This estimate does not include the cost of relocating the one unit not currently meeting income certification requirements. The budget addresses the anticipated rents for both Home Forward properties and market rate rents and/or extended stay accommodations typically available in and around the North Portland/St. Johns area.

CONCLUSION

Home Forward has followed, and will continue to follow, required procedures at Tamarack 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 Tamarack Apartments ensures that tenants are aware of their benefits and properly noticed.



Page Intentionally Left Blank – Please See Attached Resident Relocation Services
Contract - Exhibit II - Cost Summary - Tamarack Apartments

EXHIBIT E-1

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

		Phase I					Phase II		Grand Total
TAMARACK APARTMENTS	Entity / Firm / Location	Total # of Units	Unit Size	Unit Pricing	Phase I Total	Additional Explanations/Comments	Phase II Total	Additional Explanations/Comments	Total Phase I and II
Project Management/Client Meetings		12	200		2,400			Accounts for additional efforts needed due to providing onsite staffing hours (TBD), securing and utilizing extended stay accommodations translation service coordination. Additional interaction and assessments, plus file management during actual construction/moves.	2,400
Resident Assessment/File Management		118	each	\$2,000 per unit	236,000		75,000		311,000
Packing Supplies/Packing Assistance		118	each	\$500 per bedroom	59,000				59,000
Temporary Storage		78	each	\$120 per unit, per month (6mos each)	56,160	** May need to add additional storage, will be handled in Phase II depending upon final rehab scope	61,840	Updated based on personal property and room counts, \$1,000 per unit quoted price, 2 to 8 vaults of storage assumed for one month	118,000
Moving Costs - Full Move		47	1 BDRM	\$2,200 per apartment, round trip	103,400				103,400
		59	2 BDRM	\$3,000 per apartment, round trip	177,000				177,000
		12	3 BDRM	\$3,500 per apartment, round trip	42,000				42,000
Extended Stay		0	1 BDRM	\$6,000 per unit for 5 week period			282,000	\$6,000 per unit for 5 week period for remaining tenants (47) moving \$7,000 per unit (59) for 5 week period	282,000
		0	2 BDRM	\$7,000 per unit for 5 week period	14,000		413,000	Assumes multiple extended stays units will not be needed for one household.	427,000
		2	3 BDRM	\$7,000 per unit for 5 week period			70,000	\$7,000 per unit (10) for 5 week period	70,000
Resident Transportation Allowance		116	1 BDRM		83,000	Allowance includes costs related to: Resident Transportation/Shuttle for activities during temp relocation and, resident transportation to/from hotel and/or modular unit	5,000	Assumes multiple extended stays units will not be needed for one household. Also assumes 50 pets at 100 per stay	83,000
			2 BDRM					Allowance includes costs related to: Resident Transportation/Shuttle for activities during temp relocation and, resident transportation to/from hotel and/or modular unit	
			3 BDRM					Resident transportation may vary in method, i.e. taxi cabs, Uber/Lift, Trimet pass, gas cards, etc.	
Permanent - Full Move		0	1 BDRM	\$_____ per apartment, round trip					
		0	2 BDRM	\$_____ per apartment, round trip					
		0	3 BDRM	\$_____ per apartment, round trip					
Pest Mitigation Costs		4	1 BDRM	\$___ per unit, per treatment	600				600
		4	2 BDRM	\$___ per unit, per treatment	1,200				1,200
		2	3 BDRM	\$___ per unit, per treatment	900	Additional Pest Mitigation costs in Modular Units captured on Schrunck Cost Summary			900
Misc. Costs, If Any		TBD				Damage claims may be included in this category			
Postage, Mileage		TBD		Direct Costs only for reimbursables		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		26,088
Total Tamarack Relocation Services Costs					775,660	Total Relocation Services Contract - Phase I	932,928	Total Relocation Services Construct - Phase II	1,708,588