

PUBLIC NOTICE:



Home Forward
BOARD OF COMMISSIONERS
will meet on
Tuesday, March 17, 2026
At 5:30 pm
Via Teams Town Hall

**Microsoft Teams [Need help?](#)
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Meeting ID: 262 761 996 646 37
Passcode: kk78eX3R

Dial in by phone

[1 206-800-4749](tel:12068004749), [277786263#](tel:1277786263) United States, Richmond Beach

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Phone conference ID: 277 786 263#



MEMORANDUM

To: Community Partners

Date: March 11, 2026

From: Ivory N. Mathews, Chief Executive Officer

Subject: Home Forward Board of Commissioners March Meeting

The Board of Commissioners of Home Forward will meet on Tuesday, March 17 at 5:30 PM virtually using the Teams town hall platform. The meeting will be accessible to the public via phone and electronic device.

If you would like to provide public testimony or view the meeting, please use this link or the call in information:

<p>Microsoft Teams Need help? Join the meeting now Meeting ID: 262 761 996 646 37 Passcode: kk78eX3R</p> <p>Dial in by phone 1 206-800-4749,,277786263# United States, Richmond Beach Find a local number Phone conference ID: 277 786 263#</p>
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The commission meeting is open to the public.

AGENDA



BOARD OF COMMISSIONERS MEETING

HOME FORWARD
 135 SW ASH STREET
 PORTLAND, OREGON
 VIA TEAMS TOWN HALL

https://teams.microsoft.com/l/meetup-join/19%3ameeting_ZTU1NzE5YzgtYml0MS00NTM3LWExNTAtYjA1MDIxNTIIMDg0%40thread.v2/0?context=%7b%22Tid%22%3a%226b67b033-974d-4ab4-84e2-cc1717834b09%22%2c%22Oid%22%3a%22ab72a486-a170-44a9-a0f7-805d67929756%22%7d

MARCH 17, 2026, 5:30 PM
 AGENDA

INTRODUCTION AND WELCOME

PUBLIC COMMENT

General comments not pertaining to specific resolutions. Any public comment regarding a specific resolution will be heard when the resolution is considered.

MEETING MINUTES

Topic
Minutes of February 17, 2026 Board of Commissioners Virtual Meeting

REPORTS AND RESOLUTIONS

Following Reports and Resolutions:			
26-03	Topic	Presenter/POC	Phone #
01	Authorize Changes to the Admissions and Continued Occupancy Policy and to Chapters 6, 11, 13, 17, and 18 of the Administrative Plan	Terren Wing	503.802.8458

02	Authorize Actions Necessary to Provide Property Tax Exemption to Berry Ridge	Jonathan Trutt	503.802.8507
03	Authorize Property Stabilization Investment Loan at The Yards at Union Station	Juli Garvey TJ Norton	503.802.8457 503.802.8337
04	Authorize Construction Contract Authority Increase for Sequoia Square Building Enclosure Rehabilitation Construction Expenditure	Juli Garvey Lewis Lyles	503.802.8457 503.802.8484
REPORT	Portfolio Occupancy Trends, Solutions, and Progress	Ian Davie Juli Garvey	503.802.8565 503.802.8457

THE NEXT MEETING OF THE BOARD OF COMMISSIONERS

The next Board of Commissioners meeting is on Tuesday, April 21, 2026 at 5:30 PM.

The next Board Work Session is on Thursday, May 7, 2026 at Noon in person at Home Forward 135 SW Ash St.

EXECUTIVE SESSION

The Board of Commissioners of Home Forward may meet in Executive Session pursuant to ORS 192.660(2). Only representatives of the news media and designated staff are allowed to attend. News media and all other attendees are specifically directed not to disclose information that is the subject of the session. No final decision will be made in the session.

ADJOURN

MINUTES



BOARD OF COMMISSIONERS MONTHLY MEETING
HOME FORWARD
HELD VIRTUALLY
135 SW Ash Street Portland, OR 97204
February 17, 2026

COMMISSIONERS PRESENT

Chair Matthew Gebhardt, Treasurer Jessy Ledesma, Commissioners Teresa Carr, Cathy Keathley and Breann Preston

STAFF PRESENT

Juhi Aggarwal, Rylee Ahnen, Elise Anderson, April Berg, Ian Davie, Carolina Gomez, Ivory Mathews, Jennifer McMillian, Kitty Miller, Jimmy Rattanasouk, Brian Rutzen, Kandy Sage, Shannon Schmidt, Kellie Shaw, Aimee Smith, Celia Strauss, Jonathan Trutt, Linda Uppinghouse

LEGAL COUNSEL

Sarah Stauffer Curtiss

Chair Matthew Gebhardt convened the meeting of the Board of Commissioners at 5:30 PM. With an early departure of two commissioners, assuring a quorum, the meeting order was revised to take board action ahead of public comment.

MEETING MINUTES

Minutes of the December 16, 2025 Board of Commissioners Virtual Meeting

Chair Matthew Gebhardt requested a motion authorizing approval of the minutes for the December 16, 2025 Board of Commissioners Virtual Meeting.

There being no discussion, Commissioner Cathy Keathley moved to approve the meeting minutes. Commissioner Breann Preston seconded the motion.

The vote was as follows:

Chair Matthew Gebhardt—Aye
Treasurer Jessy Ledesma—Aye

Commissioner Teresa Carr—Aye
Commissioner Cathy Keathley—Aye
Commissioner Breann Preston—Aye

RESOLUTIONS

Resolution 26-02-01 Authorize Contract Amendment for Early Purchase of Deposits and Materials for the Broadway Corridor Development

Development Director Jonathan Trutt presented the resolution explaining the amendment to the Colas Construction contract to secure materials and pay for deposits. Colas has identified materials with long lead-times and require deposits for the Broadway corridor project. This includes the purchase of the cross laminated timber.

Trutt provided background on the development, formerly the site of the US Post Office at the foot of the Broadway bridge, our partnership with Urban League of Portland, funding elements, unit mix and construction details. He acknowledged this is common to ensure the project proceeds on time given the long lead time on materials and minimizes inflationary impacts. In closing, Trutt said the READ committee reviewed the request at their February 6 meeting.

There being no further discussion, Chair Matthew Gebhardt requested a motion to approve Resolution 26-02-01. Treasurer Jessy Ledesma moved to adopt Resolution 26-02-01. Commissioner Breann Preston seconded the motion.

The vote was as follows:

Chair Matthew Gebhardt—Aye
Treasurer Jessy Ledesma—Aye
Commissioner Teresa Carr—Aye
Commissioner Cathy Keathley—Aye
Commissioner Breann Preston—Aye

REPORT

General Counsel Juhi Aggarwal updated the board on Home Forward's litigation against HUD, filed in October 2025 and provided background on this action. HUD had until early February to respond to the preliminary injunction. A motion was filed by HUD to dismiss, saying either all PHAs arguments/interests protected in the King County case or the case should have been filed in Washington DC. Our outside counsel will be filing a response shortly. For now, our preliminary injunction continues to protect our federal funding from the new HUD conditions. The injunction will remain in place until either court rules on it, or

unless the appellate court sets a negative precedent. We don't expect to have further updates for a few months. According to outside counsel we are in good shape.

Chair Matthew Gebhardt thanked Aggarwal for the update.

PUBLIC COMMENTS

Cathy Millis, resident at Dahlke Manor, joined the meeting with good news they have a new property manager, Eamon. He has been engaging with Millis, listening to her leadership ideas and she is hopeful they can work together. She thanked the board for letting her join the February work session, saying she appreciated everyone welcoming her and the opportunity to see how engaged staff and the board are. She reiterated her desire to be involved in any kind of leadership position. She is participating in an advocacy training and learning how to use her skills and voice to that end. With everything going on around us, Millis reminded us to use patience, even if it's a minute at a time. Chair Matthew Gebhardt told Millis we always appreciate her involvement and especially enjoyed seeing her in person.

Jane Doe, for the record, provided public comments related to serious management concerns at her property. She shared concerns with management's requests to access her unit without authorization and an incident where maintenance enlisted police with false claims. She is a client of NARA Homeless Seniors program (Native American Rehabilitation Association) and expressed concerns over lack of accountability on her behalf. Doe requested the board assign a Home Forward person to review her allegations and work with her current property manager to assure safety, respect her privacy and coordinate with NARA to address related concerns. In closing, thanking the board for taking these allegations seriously, as she fears for her life without intervention.

Chair Gebhardt thanked Doe for sharing her concerns under challenging circumstances. It would be helpful to know which property you reside. Doe said she is impressed with what Home Forward is doing in the community and participated in Home Forward's program to own 30 years ago. She will share her information with Celia Strauss.

Jennifer McMillian, Home Forward employee and AFSCME President thanked the board for listening to their concerns, provided at the November meeting, and for working with them to reduce the impact of the budget deficit. One valued employee was lost this month, which is one too many, but she acknowledged this was a significant reduction from the numbers originally presented.

They recognize some of their ideas are being used and it tells them that collaboration matters. It reinforces that we are on the right track and we should continue to be included in ongoing budget discussions. They are mindful that furloughs will hit some employees hard, but they are preferable to more people losing their livelihoods. At the same time, it is recognized that receiving a wage increase in 2026, and avoiding additional layoffs does make a difference.

In 2026, there is an expectation for continued collaboration, clear budget planning and concrete efforts to identify savings and new revenue. Adding these efforts should be reflected in measurable data or benchmarks with an end goal of no layoffs or furloughs on the table in 2027 and 2028. McMillian recognized the importance of leadership's accountability, AFSCME's to employees and Home Forward's to all employees, residents, participants, partner agencies and the broader community being mindful this responsibility is significant and impacts numerous lives.

In closing, McMillian, speaking for AFSCME, expects positive outcomes in 2026 and beyond. No more layoffs or furloughs, continued annual wage increases, benefits that meet or exceed those in 2026 and reduced impacts on our participants and residents. She believes we can rise to the challenge for a sustainable future and thanked the board and leadership for including them in these conversations and for the collaboration now and in the future.

Chair Matthew Gebhardt echoed the sentiments shared and was pleased with the collaboration and the surfacing of ideas that were shared moving forward. It is his hope we can do your action items.

There being no further business, Chair Matthew Gebhardt adjourned the meeting at 5:55 PM.

Celia M. Strauss
Recorder, on behalf of
Ivory N. Mathews, Secretary

ADOPTED: MARCH 17, 2026

Attest:

Home Forward:

Ivory N. Mathews, Secretary

Matthew Gebhardt, Chair

RESOLUTIONS



MEMORANDUM

To: Board of Commissioners

Date: March 17, 2026

From: Terren Wing
Director, Strategy & Federal Policy
503.802.8370

Subject: Authorize Changes to the ACOP
and to Chapters 6, 11, 13, 17,
and 18 of the Administrative Plan
Resolution 26-03-01

The Board of Commissioners is requested to authorize changes to Home Forward's Administrative Plan. The Administrative Plan is the programmatic policy document for our Rent Assistance program, which serves over 14,000 households. The changes requested are to Chapters 6, 11, 13, 17, and 18 of the Administrative Plan.

Related changes are also required to Home Forward's Admissions and Continued Occupancy Policy (ACOP), which is the document that outlines policies, rules, and procedures for our public housing programs in compliance with HUD regulations.

These changes include:

- Updates to reflect a requirement from HUD that Home Forward cease its previously approved Moving to Work activity for how rents are calculated for mixed immigration status households and revert to the HUD standard proration;
- Updates outlining the Home Forward will conduct interim reexaminations to change the proration used to determine total tenant portion for mixed immigration status households;
- Updates to reflect Home Forward's Conflict of Interest Policy requirements; and
- Streamlining and cleanup of language in the ACOP.

These actions support Strategic Plan Priorities: Improve Services to Residents and Participants; Support Employees; and Lead Within the Housing Stability Ecosystem.

BACKGROUND

DETAILED OVERVIEW – ACOP CHANGES

Home Forward is proposing the following significant changes to the ACOP. A number of changes are to streamline language or remove outdated references. Those edits are not highlighted here. Complete blackline or redline copies of the documents are available upon request.

Admissions and Continued Occupancy Policy (ACOP)	
Current policy	Amended policy
<ul style="list-style-type: none"> ○ Home Forward calculates tenant rent for mixed immigration status households according to an alternative rent proration as previously approved by HUD in Home Forward’s Moving to Work Plan ○ Home Forward requires that any documents used for verification must be dated within 60 days of the preceding period ○ Home Forward applies HUD standard requirements in how Social Security Numbers are verified 	<ul style="list-style-type: none"> ○ Home Forward calculates tenant rent for mixed immigration status households according to HUD’s standard proration as required by HUD to comply with Section 214 [page 6-19] ○ Home Forward requires that documents used for verification must be dated within 120 days of the date received. Home Forward will verify families claiming zero income in EIV within 120 days of admission [page 7-2] ○ Home Forward will apply Housing Opportunity Through Modernization Act of 2016 (HOTMA) flexibilities in how Social Security Numbers are verified [page 7-7]

6-ILB. SENIORS AND PEOPLE WITH DISABILITIES HOUSEHOLDS

Households where the head of household, spouse or co-head is a person with disabilities as defined by HUD or is 55 years of age or older will be considered a senior and people with disabilities household. For households who were participating in Home Forward’s public housing program prior to implementing rent reform please also see the section below regarding Phase-In households.

For this household type, Home Forward will calculate ~~27-528.5~~5% of monthly gross income to determine the household’s TTP. Tenant rent will be determined by taking the lower of TTP or the ceiling rent minus the utility allowance. If the tenant rent payment is a negative number then the resident receives a utility reimbursement paid directly to the household to offset the cost of utility payments. This formula will be used to determine rent for seniors and people with disabilities households throughout Home Forward’s participation in the MTW demonstration. ~~Throughout the duration of the MTW demonstration, there will be a \$0 minimum rent for seniors and people with disabilities households.~~

~~Households may request a hardship exemption in accordance with section 6.II.E of this chapter.~~

6-II.C. WORK-FOCUSED HOUSEHOLDS

All households that do not meet the criteria for seniors and people with disabilities households will be considered work-focused households. For households who were participating in Home Forward's public housing program prior to implementing rent reform please also see the section below regarding Phase-In households.

Work-focused households will have their rent determined based on their year of participation. For years 1 and 2, Home Forward will calculate ~~27.5~~29.5% of monthly gross income to determine the household's Total Tenant Payment (TTP). Tenant rent will be determined by taking the lower of TTP or the ceiling rent minus the utility allowance. If the monthly rent payment is a negative

number then the resident receives a utility reimbursement paid directly to the household to offset the cost of utility payments. ~~For years 1 and 2, the minimum rent will be \$0.~~

For years 3 and 4, Home Forward ~~will institute a minimum tenant rent of \$100.~~ Home Forward will determine TTP by calculating 29.5% of the monthly gross income. Tenant rent will be determined by taking the greater of the following amounts:

- Lower of TTP or the ceiling rent minus the utility allowance
- ~~Minimum tenant rent of \$100~~

~~There will be no utility allowance reimbursements.~~

For years 5 and greater, ~~Home Forward will institute a minimum tenant rent of \$200.~~ Home Forward will determine TTP by calculating 31% of the monthly gross income. Tenant rent will be determined by taking the greater of the following amounts:

- Lower of TTP or the ceiling rent minus the utility allowance
- ~~Minimum tenant rent of \$200~~

~~There will be no utility allowance reimbursements.~~

6-II.G. RENT CALCULATION FOR MIXED FAMILIES [24 CFR 5.520 and ~~MTW~~ Annual Plan]

HUD regulations prohibit assistance to ineligible family members. A *mixed family* is one that includes at least one U.S. citizen or eligible immigrant and any number of ineligible family members. Home Forward must prorate the assistance provided to a mixed family. For any mixed family, regardless of the number of ineligible members, Home Forward will calculate the tenant rent in accordance with HUD's required standard proration for mixed families. ~~the policies outlined in 6-II.B and 6-II.C but will add an additional surcharge \$1 per month to the total rent payment.~~

Zero Income

Home Forward may accept a self-certification of zero income from families to confirm zero reported income prior to the family's admission. Families with zero countable income are required to report in writing any new income within 10 business days of the date the change takes effect. Home Forward will conduct interim recertifications in these cases.

7-I.B. OVERVIEW OF VERIFICATION REQUIREMENTS

HUD’s Verification Hierarchy [Notice PIH 2010-19]

Home Forward will verify each disclosed SSN by:

- First attempting to obtain a valid SSN card issued by the Social Security Administration (SSA), or an original document issued by a federal or state government agency that contains the name and SSN of the individual, along with other identifying information of the individual.
- If the applicant is unable to provide that information, Home Forward will accept the

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Requirements for Acceptable Documents

Any documents used for verification must be the original or authentic and generally must be dated within the 12060-day of received by period preceding Home Forward’s request date. The documents must not be damaged, altered or in any way illegible. Print-outs from web pages are considered original and authentic documents.

Income reports will be retained in resident files with the applicable recertification documents. Home Forward will verify families claiming zero income in EIV within 120 days of admission.

DETAILED OVERVIEW - ADMINISTRATIVE PLAN CHANGES

Home Forward is proposing the following changes to the Administrative Plan.

Chapter 6	
Current policy	Amended policy
<ul style="list-style-type: none"> ○ Home Forward calculates proration of subsidy for mixed immigration status households by reducing subsidy amount by \$1 per family. 	<ul style="list-style-type: none"> ○ Home Forward calculates proration of subsidy for mixed immigration status households using HUD’s standard proration [page 6-57 and 6-69].

Redline changes in Chapter 6 are detailed below.

6-III.C. OVERVIEW OF MTW RENT AND SUBSIDY CALCULATIONS [MTW Plan]

PHA Subsidy, Tenant Rent and Utility Reimbursement

Effective July 1, 2026, for mixed families, the monthly HAP for a family will be prorated using HUD standard proration in accordance with policies in Section 6-III.H.

Beginning in November 2021, the tenant rent and PHA subsidy amounts will be determined as follows for all household types:

The PHA will pay a monthly housing assistance payment (HAP) for a family that is equal to the lower of (1) the applicable payment standard minus TTP or (2) the gross rent minus TTP. This formula will be used throughout the household’s participation in the rent reform.

For mixed families, the monthly HAP for a family ~~will be~~ reduced by a flat amount in accordance with policies in Section 6-III.H.

6-III.H. PRORATED ASSISTANCE FOR MIXED FAMILIES [24 CFR 5.520]

HUD regulations prohibit assistance to ineligible family members. A *mixed family* is one that includes at least one U.S. citizen or eligible immigrant and any number of ineligible family members. The PHA must prorate the assistance provided to a mixed family. The PHA will first determine assistance as if all family members were eligible and then prorate the assistance based upon the percentage of family members that actually are eligible. For example, if the PHA subsidy for a family is calculated at \$500 and two of four family members are ineligible, the PHA subsidy would be reduced to \$250.

PHA Policy

Effective July 1, 2026, the monthly HAP for mixed families will be calculated using the HUD standard proration.

PHA Policy (MTW)

~~Previously, prior to July 1, 2026, the PHA simplified~~ the proration of subsidy for mixed families so that a flat monthly reduction in assistance is applied to the household, regardless of the number of ineligible family members. The PHA will determine the proration amount after reviewing agency rents and payment standards based upon funding availability.

The PHA will reduce the monthly PHA subsidy for a mixed family by \$1 per family beginning in November 2020 (previously the monthly proration amount was fixed at \$100 per family).

Chapter 11	
Current policy	Amended policy
<ul style="list-style-type: none"> o Home Forward conducts interim reexaminations to change the percentages of gross income used to determine total tenant payment as described in Chapter 6 	<ul style="list-style-type: none"> o Home Forward continues to conduct interim reexaminations in this manner for all MTW households (except for EHV households), but the referenced section in Chapter 6 has been updated [page 11-12].

Redline changes in Chapter 11 are detailed below.

11-II.D. CHANGES AFFECTING INCOME OR EXPENSES

PHA Policy (MTW)

In addition to the instances described above, the PHA will conduct interim reexaminations as follows:

The PHA will conduct interim reexaminations effective April 1, 2012 to transition all MTW households to the new rent calculation methodology as described in Chapter 6.

As a result of sequestration, the PHA will conduct interim reexaminations effective August 1, 2013 for all MTW households to change the percentages of gross income used to determine total tenant payment as described in Chapter 6.

The PHA will conduct interim reexaminations effective July 1, 2026 to prorate monthly HAP for all mixed families using HUD standard proration as described in Chapter 6.

~~Prior to July 1, 2026, the PHA will conduct~~ interim reexaminations to update the amount of monthly subsidy reduction for mixed families as described in Chapter 6.

Chapter 13	
Current policy	Amended policy
<ul style="list-style-type: none"> Home Forward will consider certain factors when determining whether to request a conflict of interest waiver from HUD, including existence of alternatives, individual circumstances, specific individual duties, and nature of financial investment, among others. 	<ul style="list-style-type: none"> Adds greater detail to align with Home Forward's recently updated Conflict of Interest Policy [page 13-11].

Redline changes in Chapter 13 are detailed below.

Where the PHA has requested a conflict of interest waiver, the PHA may not execute the HAP contract until HUD has made a decision on the waiver request.

PHA Policy

The PHA will not approve any tenancy in which a PHA Commissioner, PHA employee, or any relative of the Commissioner or employee has or has had a direct or indirect interest during their tenure with the PHA or within one year following the end of that tenure. A relative is defined as parents, parents-in-law, stepparents, spouses, domestic partners, children, stepchildren, siblings, siblings-in-law, stepsiblings, half siblings, grandparents, step grandparents, grandparents-in-laws, any individual who the Employee, Committee member, or Commissioner has a legal support obligation to such as child support or spousal support, any individual who is covered by the Employee's, Council member's, or Commissioner's employer provided benefits, and any individual who covers the Employee, Council member, or Commissioner on their employer provider benefits.

Chapter 17	
Current policy	Amended policy
<ul style="list-style-type: none"> For mixed immigration status families who have project-based voucher assistance, Home Forward reduces the monthly housing assistance payments by a flat amount. 	<ul style="list-style-type: none"> For mixed immigration status families who have project-based voucher assistance, Home Forward calculates the monthly housing assistance payment using the HUD standard proration. [page 17-68].

Redline changes in Chapter 17 are detailed below.

17-IX.C. TENANT RENT TO OWNER [24 CFR 983.353]

The tenant rent is the portion of the rent to owner paid by the family. The amount of tenant rent is determined by the PHA in accordance with HUD requirements. Any changes in the amount of tenant rent will be effective on the date stated in the PHA notice to the family and owner.

The family is responsible for paying the tenant rent (total tenant payment minus the utility allowance). The amount of the tenant rent determined by the PHA is the maximum amount the owner may charge the family for rental of a contract unit. The tenant rent covers all housing services, maintenance, equipment, and utilities to be provided by the owner. The owner may not demand or accept any rent payment from the tenant in excess of the tenant rent as determined by the PHA. The owner must immediately return any excess payment to the tenant.

Effective July 1, 2026, the monthly HAP for mixed families will be calculated using HUD standard proration as described in Section 6-III.H.

~~Prior to July 1, 2026, F~~for mixed families, the monthly HAP for a family will be reduced by a flat amount in accordance with policies in Section 6-III.H.

The monthly HAP to owner is the lower of (1) the monthly HAP for a family or (2) the rent to owner.

The tenant rent to owner is the rent to owner minus HAP to owner.

When the monthly HAP for a family exceeds the rent to owner, the PHA will allow utility reimbursement to the family.

Revised utility allowances will be applied to the family's rent and subsidy calculations at the first regular reexamination that is effective after the allowance is adopted.

Chapter 18	
Current policy	Amended policy
<ul style="list-style-type: none">○ For mixed immigration status families who have project-based voucher assistance under the Rental Assistance Demonstration (RAD) program, Home Forward reduces the monthly housing assistance payments by a flat amount.	<ul style="list-style-type: none">○ For mixed immigration status families who have project-based voucher assistance under the RAD program, Home Forward calculates the monthly housing assistance payment using the HUD standard proration. [page 18-49]

Redline changes in Chapter 18 are detailed below.

18-VIII.C. TENANT RENT TO OWNER [24 CFR 983.353]

The tenant rent is the portion of the rent to owner paid by the family. The amount of tenant rent is determined by the PHA in accordance with HUD requirements. Any changes in the amount of tenant rent will be effective on the date stated in the PHA notice to the family and owner.

The family is responsible for paying the tenant rent (total tenant payment minus the utility allowance). The amount of the tenant rent determined by the PHA is the maximum amount the owner may charge the family for rental of a contract unit. The tenant rent covers all housing services, maintenance, equipment, and utilities to be provided by the owner. The owner may not demand or accept any rent payment from the tenant in excess of the tenant rent as determined by the PHA. The owner must immediately return any excess payment to the tenant.

The PHA's rent reform initiative has established a rent and subsidy calculation methodology that distinguishes between two household types: seniors / people with disabilities and the work-focused households. Rent and subsidy amounts are determined based on a household type and year of participation in the rent reform. This section explains how rent and subsidy are determined for RAD PBV households. The household types, TTP formula, and minimum tenant rent are defined in Section 6-III.C.

PHA Policy (MTW)

Effective July 1, 2026, for mixed families, the monthly HAP will be calculated using the standard proration as described in Section 6-III.H.

Beginning in November 2021, the tenant rent and subsidy amounts for RAD PBV households will be determined as follows for all household types:

The PHA will pay a monthly housing assistance payment (HAP) for a family that is equal to the gross rent minus TTP. This formula will be used throughout the household's participation in the rent reform.

~~F~~For mixed families, the monthly HAP for a family will be reduced by a flat amount in accordance with policies in Section 6-III.H.

The monthly HAP to owner is the lower of (1) the monthly HAP for a family or (2) the rent to owner.

The tenant rent to owner is the rent to owner minus HAP to owner.

When the monthly HAP for a family exceeds the rent to owner, the PHA will allow utility reimbursement to the family.

Previously, the tenant rent and PHA subsidy amounts for RAD PBV households were determined as described below.

For seniors and people with disabilities households, the PHA will pay a monthly housing assistance payment (HAP) for a family that is equal to the gross rent minus TTP. This formula will be used throughout the household's participation in the rent reform.

~~For mixed families, the monthly HAP for a family will be reduced by a flat amount in accordance with policies in Section 6-III.H. *Effective July 1, 2026*, for mixed families, the monthly HAP will be calculated using the standard proration as described in Section 6-III.H.~~

The monthly HAP to owner is the lower of (1) the monthly HAP for a family or (2) the rent to owner.

The tenant rent to owner is the rent to owner minus HAP to owner.

CONCLUSION

Accordingly, staff request approval for changes to the ACOP and to Chapters 6, 11, 13, 17, and 18 of the Administrative Plan.

ATTACHMENTS

The redline or blackline version of the ACOP and Administrative Plan chapters can be provided upon request.



RESOLUTION 26-03-01

RESOLUTION 26-03-01 AUTHORIZES HOME FORWARD STAFF TO AMEND THE ADMISSIONS AND CONTINUED OCCUPANCY POLICY (ACOP) AND CHAPTERS 6, 11, 13, 17, AND 18 OF HOME FORWARD'S ADMINISTRATIVE PLAN GOVERNING THE ADMINISTRATION OF RENT ASSISTANCE

WHEREAS, the Department of Housing and Urban Development (HUD) permits a Public Housing Authority to amend and modify its ACOP and Administrative Plan with Board of Commissioners' approval; and

WHEREAS, on February 26, 2026, HUD approved Home Forward's FY2026 Moving to Work Plan which provides authority for some of the changes detailed in the attached memorandum;

WHEREAS, Home Forward proposes amendments to its ACOP and to Chapters 6, 11, 13, 17, and 18 of the Administrative Plan to incorporate the updates outlined above; and

WHEREAS, from time to time, Home Forward reviews its programmatic policy documents to bring them into alignment with current policies, practices, statutes, and regulations; and

NOW, THEREFORE, BE IT RESOLVED, by the Board of Commissioners of Home Forward that Home Forward staff is authorized to make changes to the ACOP and to Chapters 6, 11, 13, 17, and 18 of the Administrative Plan as outlined in the March 17, 2026 Memorandum from Home Forward staff to the Board of Commissioners.

ADOPTED: MARCH 17, 2026

Attest:

Home Forward:

Ivory N. Mathews, Secretary

Matthew Gebhardt, Chair



MEMORANDUM

To: Board of Commissioners
Date: March 17, 2026

From: Jonathan Trutt
Director of Development
503.802.8507

Subject: Authorize Actions Necessary to
Provide Property Tax Exemption to
Berry Ridge
Resolution 26-03-02

The Board of Commissioners is requested to approve Resolution 26-03-02 authorizing the execution and delivery of documents by Home Forward, on its own behalf and in its capacity as the Housing Authority Administrative Member of Berry Ridge Gresham LLC (the "*Owner*"), to provide Berry Ridge with a property tax exemption.

This action supports our 2023-2026 Strategic Plan Goal to lead with the housing stability ecosystem and advance innovative solutions that expand supply.

BACKGROUND

Per Oregon Revised Statutes (ORS) 307.092, housing developments are entitled to a full property tax exemption if

- They serve households earning 80% or less of area median income and
- Their ownership structure includes a housing authority.

Home Forward has developed policy guidelines pursuant to which it will participate as a special limited partner or non-managing member within an ownership structure to enable projects to obtain a property tax exemption. The property tax exemption stemming from such participation helps foster affordable housing construction and preservation that otherwise would not happen. Members of the Real Estate and Development (READ) Committee helped develop these policy guidelines. To date, Home Forward's Property Tax Exemption policy has helped catalyze the construction of 527 new affordable homes in Multnomah County since 2021: 316 in Gresham and 211 in Portland.

Gresham and Home Forward into an Intergovernmental Agreement (IGA) in 2021. This IGA enumerates how and when Home Forward will utilize its statutory authority to extend

property tax exemptions within Gresham city limits for newly-constructed affordable housing.

This IGA was authorized by the Resolution 2021-09-03 and extended by one year to run through June 30, 2024. It was renewed through June 30, 2027 in 2024, and expanded to include preservation efforts, per Resolution 24-09-02.

OVERVIEW

The following key facts are relevant to Berry Ridge:

- Berry Ridge is an existing 248-unit affordable housing development located at 2711 W. Powell Boulevard, Gresham, OR 97030, which was originally developed with low-income housing tax credits (“*LIHTC*”).
 - Its current residents are households that meet the LIHTC income requirements.
 - LIHTC income requirements dovetail with the income requirements of ORS 307.092.
- Berry Ridge offers a mix of bedroom sizes, ranging from one to two-bedroom homes.
- BRIDGE Northwest Development is currently the sole member of the Owner, and it will become the managing member of the Owner once Home Forward is admitted to the ownership structure.
- Gresham and Home Forward have reviewed Berry Ridge’s request for a property tax exemption pursuant to the terms of our IGA.
- Gresham and Home Forward concur that Berry Ridge meets the eligibility criteria enumerated in our IGA.
- Unlike LIHTC projects that are developed by Home Forward, Home Forward is not required to lend the Owner money, to lease property to the Owner, to provide financial guaranties to Berry Ridge’s lenders or investor, or to operate Berry Ridge.

CONCLUSION

Staff requests the Board of Commissioners authorize the delivery and execution of documents to admit Home Forward as the Housing Authority Administrative Member to the Owner.

Staff presented a draft of this memo and resolution to the READ committee on March 6, 2026.

ATTACHMENTS

Exhibit A: Resolution 24-09-02 and Accompanying Memo



RESOLUTION 26-03-02

RESOLUTION 26-03-02 AUTHORIZES THE EXECUTION AND DELIVERY OF DOCUMENTS BY HOME FORWARD, ON ITS OWN BEHALF AND IN ITS CAPACITY AS HOUSING AUTHORITY ADMINISTRATIVE MEMBER OF BERRY RIDGE GRESHAM LLC, IN CONNECTION WITH THE OPERATION OF BERRY RIDGE

WHEREAS, Home Forward seeks to encourage the provision of long-term housing for low income persons residing in the City of Gresham, Oregon;

WHEREAS, ORS 456.120(20) authorizes Home Forward to have a nonstock interest in limited liability companies in order to further Home Forward's purposes;

WHEREAS, ORS 456.065 defines "housing project" to include, among other things, "any work or undertaking . . . to provide decent, safe and sanitary urban or rural housing for persons or families of lower income";

WHEREAS, ORS 307.092 provides a property tax exemption for property of a limited liability company in which a housing authority is a member, so long as the property is rented to persons of lower income for housing purposes, and the limited liability company complies with ORS 307.162;

WHEREAS, ORS 456.135 authorizes Home Forward to delegate to one or more of its agents and employees such powers as it deems proper;

WHEREAS, Berry Ridge Gresham LLC (the "*Owner*") was formed to own and operate an existing 248-unit affordable housing development located at 2711 W. Powell Boulevard in Gresham, Oregon (the "*Project*"), which was originally developed with federal low-income housing tax credits ("*LIHTCs*") under Section 42 of the Internal Revenue Code of 1986, as amended (the "*Code*");

WHEREAS, the current sole member of the Owner is BRIDGE Northwest Development ("*Managing Member*");

WHEREAS, the Owner is governed by an Operating Agreement (the “*Operating Agreement*”);

WHEREAS, Managing Member has asked that Home Forward become the Housing Authority Administrative Member of the Owner, and that Home Forward provide certain services with respect to the Project, in exchange for the payment of a fee to Home Forward and a commitment to maintain the Project as affordable rental housing for 60 years; and

WHEREAS, Home Forward’s Board of Commissioners (the “*Board*”) finds and determines that, as a result of Home Forward’s participation as an administrative member of the Owner, it can qualify for a property tax exemption that will reduce the Project’s annual operating expense and allow the Owner to better serve its tenant population at rents restricted to the 60% of Area Median Income level;

NOW, THEREFORE, BE IT RESOLVED by the Board as follows:

1. ORS 456.153 Determinations. On behalf of Home Forward, the Board finds and determines that a substantial number of persons of eligible income in the area served by Home Forward cannot obtain housing for 30% of less of their income. Based on the foregoing determination, the Board hereby declares, on behalf of Home Forward, the need for additional housing for persons or families of lower income that can be addressed by Home Forward participating in the financing, development, ownership, management and/or operation of mixed income housing projects.
2. Participation in Owner. Home Forward is hereby authorized to acquire a membership interest in the Owner, and become an administrative member of the Owner. Home Forward is further authorized to expend up to \$10 to make a capital contribution to the Owner upon the following terms and conditions:
 - An affordability covenant shall be recorded against the property restricting the Project to households with incomes at initial occupancy at 60% or less of the Area Median Income or less for a period of 60 years.
 - An affordability covenant shall be recorded against the property restricting the Project’s rents to 60% Area Median Income levels, as published annually by the Department of Housing and Urban Development and adjusted for unit size and utility costs.
 - Home Forward shall provide no guarantees.

- Home Forward shall accept no underwriting, operational or fiduciary responsibilities.
 - Sole recourse in the event of any default is limited to Home Forward’s Owner or member interest.
 - Home Forward shall be fully indemnified by Managing Member and/or its affiliate with net worth requirements acceptable to Home Forward for any and all claims arising from our participation in the Project, including but not limited to any environmental claims.
 - The property tax exemption is necessary for the Project’s continued economic feasibility as affordable housing.
 - Payment of a fee of not to exceed \$600,000 The fee is to be paid upon Home Forward’s admission into the Owner and will be provided to Gresham in accordance with the Intergovernmental Agreement between Gresham and Home Forward dated October 1, 2024.
 - Home Forward shall have unilateral right to withdraw from the Owner under certain circumstances—e.g. non-compliance with affordability covenants, acts of fraud, gross negligence.
3. Approval of Documents. Home Forward will be presented with drafts of the following documents to be executed and delivered by Home Forward in connection with the Owner and the Project (the “*Documents*”), which documents will, upon request, be placed on file with Home Forward’s Secretary:
- Amended and Restated Limited Operating Agreement by and between Managing Member and Home Forward;
 - Indemnity Agreement by the Owner, Managing Member, BRIDGE Housing Corporation for the benefit of Home Forward;
 - Regulatory Agreement by and between the Owner and Home Forward; and
 - All such other documents as may be reasonably necessary to accomplish the foregoing.

Home Forward is authorized and directed to execute and deliver the Documents upon the review and approval of legal counsel and the Director of Project and any Authorized Officer’s signature on the final Documents shall be construed as Home Forward’s approval of such changes. While the titles of and parties to the Documents may change, no such change shall affect the authority conferred by this resolution to execute, deliver, file (if required), enforce and perform the Documents in their final form.

4. Execution of Documents. The Chair of the Board, Home Forward’s Chief Executive Officer, Home Forward’s Chief Financial Officer, and their respective designees (each, an “*Authorized Officer*” and, collectively, the “*Authorized Officers*”), and each of them acting alone, are authorized and directed to execute and deliver the Documents on behalf of Home Forward. The Authorized Officers (and each of them acting alone) are further authorized and directed to take any other action and to execute such other documents as may be required to be taken or executed by Home Forward under the provisions of or as necessary to carry out the transactions contemplated by the Documents and this resolution. From and after the date the Documents are executed, the Authorized Officers (and each of them acting alone) are authorized and directed, without further Board approval, to take such actions on behalf of Home Forward that are required to be taken by Home Forward in its capacity as a limited partner of the Owner.
5. Supplemental Authorization. The Authorized Officers, and each of them acting alone, are authorized on behalf of Home Forward to: (i) determine that any document authorized by this resolution is, at the time such document otherwise would be executed, no longer necessary or desirable and, based on such determination, cause Home Forward not to execute or deliver such document; and (ii) execute and deliver and, if applicable, file (or cause to be delivered and/or filed) any government forms, affidavits, certificates, letters, documents, agreements and instruments that such officer determines to be necessary or advisable to give effect to this resolution and to consummate the transactions contemplated herein.
6. Execution of Duties and Obligations. The Board authorizes Home Forward’s Chief Executive Officer to cause Home Forward to fulfill Home Forward’s duties and obligations under the Documents and other instruments authorized by this resolution.
7. Acting Officers Authorized. Any action required by this resolution to be taken by the Chair of the Board, Home Forward’s Chief Executive Officer, or Home Forward’s Chief Financial Officer, may, in the absence of such person, be taken by the duly authorized acting Chair of the Board, acting Chief Executive Officer of Home Forward, or acting Chief Financial Officer, respectively.
8. Ratification and Confirmation. Any actions of Home Forward or its officers prior to the date hereof and consistent with the terms of this resolution are ratified and confirmed.

9. Effective Date. This resolution shall be in full force and effect from and after its adoption and approval.

ADOPTED: March 17, 2026

Attest:

Home Forward:

Ivory N. Mathews, Secretary

Matthew Gebhardt, Chair

CERTIFICATE

I, the undersigned, the duly chosen, qualified and acting Chief Executive Officer and Secretary-Treasurer of Home Forward and keeper of the records of Home Forward, CERTIFY:

1. That the attached Resolution 26-03-02 (the "*Resolution*") is a true and correct copy of the resolution of the Board of Commissioners of Home Forward, as adopted at a meeting of Home Forward held on March 17, 2026, and duly recorded in the minute books of Home Forward.

2. That such meeting was duly convened and held in all respects in accordance with law, and, to the extent required by law, due and proper notice of such meeting was given; that a quorum was present throughout the meeting and a majority of the members of the Board of Commissioners of Home Forward present at the meeting voted in the proper manner for the adoption of the Resolution; that all other requirements and proceedings incident to the proper adoption of the Resolution have been duly fulfilled, carried out and otherwise observed, and that I am authorized to execute this Certificate.

IN WITNESS WHEREOF, I have hereunto set my hand this 17th day of March, 2026.

HOME FORWARD

Ivory N. Mathews, Secretary

Exhibit A



MEMORANDUM

To: Board of Commissioners
Date: September 17, 2024

From: Jonathan Trutt
Director of Development
503.802.8507
Subject: Inter-Governmental
Agreement with Gresham
Regarding Property Tax
Exemption
Resolution 24-09-02

The Board of Commissioners is requested to authorize Home Forward to execute an Intergovernmental Agreement (IGA) with Gresham. The IGA outlines the terms under which Home Forward may elect to provide property tax exemption to new affordable housing developments and affordable housing preservation within Gresham.

These actions support Home Forward’s 2023-2026 Strategic Plan Goal to lead within the housing stability ecosystem and use our developmental expertise to advance innovative solutions that expand supply and address community needs.

BACKGROUND

Property tax exemption is an effective affordable housing financing tool because it increases the private mortgage a project can obtain. For any given project, a larger private mortgage translates into less reliance on limited state and local funding sources such as general obligation bonds.

Oregon law allows for affordable housing property tax exemptions through a variety of methods.

- One common method—utilized by non-for-profit developers in Portland—relies on the approval of local taxing jurisdictions.
- Housing authority property ownership is another route to property tax exemption.

- Affordable apartments in properties owned by Oregon housing authorities receive property tax exemption so long as they are income and rent-restricted at rents affordable to households earning at or below 80% of area median income level.
- This exemption is available to a project even when a housing authority has an extremely limited role in its development and operations—e.g. a 0.01% ownership stake, no fiduciary responsibilities and no role in daily operations (a “Limited Partner Role.”)
- Property tax exemption provided via a housing authority’s Limited Partner Role does not require approval by any local taxing jurisdictions.

OVERVIEW

In September of 2021, Gresham and Home Forward executed an IGA outlining how and when Home Forward would facilitate property tax exemption for new affordable housing construction within city limits. This IGA was authorized via Resolution 21-09-03. Per the IGA, Home Forward provided tax exemption to two projects in the past three years—Rockwood Village and Terracina Vista—totaling 316 affordable homes.

Key elements of the 2021 IGA included:

- A lump sum payment in lieu of taxes shared by Gresham and Home Forward.
 - Gresham received receive 60% of this payment.
 - Home Forward will use its share of the payment towards resident services efforts within Gresham.
- An agreement that Home Forward will offer property tax exemption via a Limited Partner Role only to projects that meet both Home Forward and Gresham requirements.
- Limitations on time and extent. Property tax exemptions were available to only four new construction projects and the agreement expired on June 30, 2023. In 2023, Home Forward and Gresham agreed to extend the IGAs by one year to June 30, 2024.

Home Forward and Gresham now seek to execute a new IGA which:

- Continues the key elements of the 2021 IGA through June 30, 2027.
- Expands the category of eligible projects to include affordable housing preservation—i.e. not just new construction.

CONCLUSION

Executing the IGA can help expand and preserve Gresham’s affordable housing supply without subjecting Home Forward to development or operational risk. Staff recommends that the Commissioners authorize Home Forward to enter into the attached IGA with Gresham.

The Real Estate and Development (READ) Committee of Home Forward’s Board of Commissioners reviewed a draft of this resolution at its September 6, 2024 meeting.

ATTACHMENT

Intergovernmental Agreement Between City of Gresham and Home Forward



RESOLUTION 24-09-02

RESOLUTION 24-09-02 AUTHORIZES THE CHIEF EXECUTIVE OFFICER TO EXECUTE AN INTERGOVERNMENTAL AGREEMENT WITH THE CITY OF GRESHAM REGARDING PROPERTY TAX EXEMPTION FOR AFFORDABLE HOUSING

WHEREAS, Multnomah County faces an affordable housing shortage;

WHEREAS, property tax exemptions are an effective affordable housing financing tool that decreases reliance on state and local capital funding sources;

WHEREAS, the City of Gresham recognizes property tax exemption's value as an affordable housing financing tool;

WHEREAS, per Oregon law, Home Forward can provide property tax exemptions to affordable housing efforts spearheaded by other organizations;

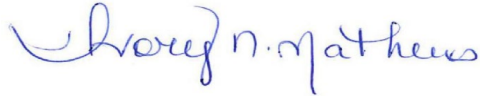
WHEREAS, consistent with Gresham's affordable housing development goals, Home Forward wishes to provide property tax exemption to new affordable housing developments and affordable housing preservation within Gresham spearheaded by other organizations;

WHEREAS, Gresham and Home Forward have jointly drafted an Intergovernmental Agreement regarding property tax exemption for new affordable housing and affordable housing preservation;

NOW, THEREFORE, BE IT RESOLVED, that the Board of Commissioners of Home Forward authorizes and directs the Chief Executive Officer to execute an Intergovernmental Agreement with the City of Gresham substantially in accordance with the document attached as Exhibit 1.

ADOPTED: SEPTEMBER 17, 2024

Attest:



Ivory N. Mathews, Secretary

Home Forward:



Matthew Gebhardt, Chair



MEMORANDUM

To: Board of Commissioners
Date: March 17, 2026

From: Juli Garvey, Director of
Asset Management
503.802.8457
Subject: Authorize Property Stabilization
Investment Loan to pay down
existing debt at The Yards at
Union Station
Resolution 26-03-03

TJ Norton, Asset Manager
503.802.8337

The Board of Commissioners is requested to authorize the Chief Executive Officer, or her designee, to execute the necessary documents and agreements to obtain a new loan through the Oregon Housing and Community Services (OHCS) Property Stabilization Investment (PSI) program.

This action supports Home Forward's Strategic Plan Goal to improve utilization of the existing housing portfolio while planning for future portfolio needs.

BACKGROUND

The Yards at Union Station is a 158-unit property located at 945 NW Naito Parkway, Portland Oregon, 97209. The property consists of 66 studio units, 53 one-bedroom units, and 39 two-bedroom units. The units are restricted to households earning between 50%-60% of the Area Median Income (AMI). The property has a primary loan through the Housing Refunding Revenue Bonds, Series 2007 (Yards at Union Station Project) that is set to mature on May 1, 2029, with a remaining balance of \$1,680,000. To address challenges related to rising operating costs, Home Forward applied for and was awarded funding through OHCS's newly created Property Stabilization Investment (PSI) program, which is designed to assist financially stressed properties in buying down or retiring existing debt. Home Forward was awarded \$1,736,790 in PSI funds for The Yards.

OVERVIEW

Key terms of the proposed refinance loan are as follows:

- Principal amount of \$1,736,790;

- 30-year non-amortized loan;
- Interest rate of 1% annually;
- No prepayment penalty;
- No required annual debt service but the loan's interest and principal are due at maturity, refinancing, end of existing affordability period, or resyndication - whichever occurs first;
- Property Expense-to-Income ratio should remain below 87% for the first five years post-award;
- Cost of the loan: Reservation charge of \$2,000 and \$2,250 for document recording.

FINANCIAL IMPACT AND RISK

This refinancing presents minimal financial risk to Home Forward and significantly improves the property's financial position. The property currently pays approximately \$430,000 annually in bond debt service. Under the proposed OHCS loan terms, no annual debt service payments are required. To fully retire the loan by the end of the new affordability period (January 1, 2033), Home Forward would need to set aside approximately \$258,226 annually — substantially less than the current bond obligation. This reduction improves the property's overall financial stability.

The increased operating flexibility has already allowed Home Forward to reduce or maintain current rent levels at The Yards, directly benefiting residents while maintaining long-term affordability. In addition, \$725,642 currently held in property-level bond reserve and money market accounts will become available upon repayment of the bonds, which further strengthens the property's financial position.

Overall, the refinancing enhances revenues, reduces financial pressure, and supports the long-term viability of the asset.

CONCLUSION

Home Forward staff requests the Board of Commissioners to approve Resolution 26-03-03 to grant authorization to the Chief Executive Officer or her designee to execute necessary documents and agreements required to obtain the OHCS PSI loan for The Yards at Union Station.



RESOLUTION 26-03-03

RESOLUTION 26-03-03 AUTHORIZES THE EXECUTION OF THE NECESSARY LOAN DOCUMENTS TO REFINANCE THE EXISTING BOND ON THE YARDS AT UNION STATION WITH OREGON HOUSING AND COMMUNITY SERVICES

WHEREAS, Home Forward desires to prepay the Housing Refunding Revenue Bonds, Series 2007 (Yards at Union Station Project);

WHEREAS, Home Forward has received \$1,736,790 in Project Stabilization Investment (PSI) funds from Oregon Housing and Community Services (OHCS);

WHEREAS, Home Forward seeks to encourage the provision of long-term housing for low-income persons residing in the City of Portland, Oregon (the “City”);

WHEREAS, ORS 456.120(18) authorizes Home Forward to finance, plan, undertake, construct, acquire and operate housing projects;

WHEREAS, ORS 456.135 authorizes Home Forward to delegate such powers to one or more of its agents and employees such powers as it deems proper;

NOW, THEREFORE, BE IT RESOLVED, that the Board of Commissioners of Home Forward hereby authorizes the Chief Executive Officer or her designee to execute the necessary documents and agreements with Oregon Housing and Community Services to obtain and secure a new loan for The Yards at Union Station.

ADOPTED: MARCH 17, 2026

Attest:

Home Forward:

Ivory N. Mathews, Secretary

Matthew Gebhardt, Chair



MEMORANDUM

To: Board of Commissioners
Date: March 17, 2026

From: Juli Garvey, Director of
Asset Management
503.802.8457
Subject: Authorize Construction Contract
Authority Increase for Sequoia
Square Building Enclosure
Rehabilitation
Resolution 26-03-04

Lewis Lyles, Project Manager of
Development
503.802.8484

The Board of Commissioners is requested to authorize the Chief Executive Officer or her designee to approve:

- Additional construction expenditures authorization for The Sequoia Square Apartments required to complete its renovation. The requested authorization will increase construction expenditures by up to \$1,000,000, for a total authorized construction expenditure of \$7,078,290.

This approval would enable the completion of construction, consistent with the rehabilitation budget established for the project.

These actions support Home Forward's 2023-2026 Strategic Plan Goal to lead within the housing stability ecosystem and use our developmental expertise to advance innovative solutions that expand supply and address community needs.

BACKGROUND

Sequoia Square Apartments is an affordable housing property on a 1.86-acre parcel in a Southeast Portland neighborhood. It serves residents with incomes between 30% and 60% of area median income. It has been undergoing a major building enclosure rehabilitation that includes structural rot repairs consisting of reconstruction of the balcony decks and stairs, doors, windows, bathroom ventilation and roofing.

Previous board action related to Sequoia Square includes authorization to contract with Baldwin General Contracting, Inc. for of \$6,078,290 of construction costs (Resolution 24-01-01).

OVERVIEW

To pay for project completion, Home Forward will need to increase our construction expenditures at Sequoia Square by \$1,000,000 above the \$6,078,290 amount previously authorized by the Board. The requested increase in expenditure is due to unforeseen site conditions and additional scope of work, specifically:

- Radon mitigation
- Electrical repairs
- Framing corrections for the installation of the new doors
- Concrete sidewalk replacement damaged by tree roots
- Additional interior drywall and painting repairs caused by mold remediation

Home Forward will pay these additional construction costs with capital funds from project savings combined with Home Forward reserves. The requested additional \$1 million of expenditures is within the amended construction budget established for the property once the unforeseen circumstances were discovered.

CONCLUSION

Home Forward staff requests that the Board of Commissioners approve the resolution increasing the construction expenditure amount by \$1,00,000.

The Real Estate and Development (READ) Committee of Home Forward's board reviewed a draft of this resolution at its March 6, 2026, meeting.



RESOLUTION 26-03-04

RESOLUTION 26-03-04 AUTHORIZES THE CHIEF EXECUTIVE OFFICER OR HER DESIGNEE TO INCREASE CONSTRUCTION EXPENDITURES FOR SEQUOIA SQUARE TO \$500,000

WHEREAS, the Home Forward Board of Commissioners previously authorized the execution of a contract with Baldwin General Contracting, Inc. (“Baldwin”) for the rehabilitation of the Sequoia Square Apartments;

WHEREAS, the Home Forward Board of Commissioners previously authorized the execution of \$6,078,290 of construction expenditures for the Sequoia Square Apartments;

WHEREAS, unforeseen site conditions, scope of work improvements, and radon mitigation at the Sequoia Square Apartments require additional construction expenditure authorization to pay for the completion of the project;

WHEREAS, amendments to the construction contract with Baldwin will exceed the \$500,000 threshold requiring additional board authorization,

NOW, THEREFORE, BE IT RESOLVED, that the Board of Commissioners of Home Forward hereby authorizes the Chief Executive Officer, or her designee, to increase the amount of the Baldwin General Contracting contract above the previously authorized level of \$6,078,290 by \$1,000,000, for a total construction expenditure of up to \$7,078,290 to complete the Sequoia Square Apartment’s construction.

ADOPTED: March 17, 2026

Attest:

Home Forward:

Ivory N. Mathews, Secretary

Matthew Gebhardt, Chair

STAFF REPORTS

**Procurement & Contracts Department
MONTHLY CONTRACT REPORT
Contracts Approved 01/01/26 - 02/28/26**

PUBLIC IMPROVEMENT
(CONSTRUCTION & MAINTENANCE SERVICES)

Contract #	Amend #	Contractor	Contract Amount	Description	Dept.	Execution Date	Expiration Date
C3801		MJ General Contractors	\$23,500.00	Fire damage reconstruction at Ruth Haefner	Property Management	2/3/2026	4/30/2026
Subtotal			\$23,500.00				1

GOODS & SERVICES

Contract #	Amend #	Contractor	Contract Amount	Description	Dept.	Execution Date	Expiration Date
C3774		Oregon Backflow Testing LLC	\$100,000.00	On-call backflow testing	IFS	1/12/2026	12/14/2028
C3798		Eclipse Security Professionals LLC	\$4,800.00	Security at Gallagher Plaza	Property Mgmt	1/22/2026	3/15/2026
C3770		EV United	\$64,276.00	EV Charger install at Humboldt Gardens	IFS	1/26/2026	1/31/2026
C3771		EV United	\$49,812.00	EV Charger install at Slavin Ct	IFS	1/26/2026	1/31/2026
C3800		Servpro East Portland	\$8,500.00	Commercial cleaning	Property Mgmt	1/30/2026	1/29/2026
C3803		Get It Done PDX LLC	\$25,324.03	Restoration of unit at Schrunk	Property Management	2/3/2026	4/30/2026
C3806		To Do's Maintenance	\$3,650.00	Remove and replace flooring in single unit at HWE	Property Management	2/3/2026	3/3/2026
C3795		Harder Mechanical Contractors Inc.	\$5,878.00	Annual HVAC service for Stephan's Creek Crossing	Property Mgmt	2/4/2026	2/1/2027
C3804		Eclipse Security Professionals LLC	\$49,200.00	Security at Madrona, Alderwood, Eastwood Ct, Stark Manor, and Fir Acres	Property Management	2/10/2026	1/28/2027
C3813		Ben Gloss Construction	\$1,100.00	Camera installation at Chateau	Asset Management	2/10/2026	3/31/2026
C3811		A.C. Moate Industries Inc	\$7,572.07	Fix concrete walkway at Alderwood	Property Management	2/13/2026	2/28/2026
C3815		Eclipse Security Professionals LLC	\$23,976.00	Security at Cesar	Property Management	2/23/2026	4/30/2026
C3816		Carbonell Cleaning Solutions	\$24,900.00	Janitorial services at Cesar	Property Management	2/23/2026	7/31/2026

C3821		USA Mechanical	\$3,580.00	Quarterly HVAC at NW Tower	Property Management	2/25/2026	3/1/2027
C3823		To Do's Maintenance	\$2,150.00	Install flooring at HWE	Property Management	2/26/2026	3/27/2026
Subtotal			\$374,718.10				15

PERSONAL SERVICE CONTRACTS

Contract #	Amend #	Contractor	Contract Amount	Description	Dept.	Execution Date	Expiration Date
C3777		Cornerstone Community Housing	\$120,625.69	Resident services at Hazel Ying Lee; Rule 46-0340	Community Services	1/5/2026	12/31/2026
C3788		Pegasus Moving & Cleaning	\$97,363.20	Housekeeping services at CHSP sites; Rule 46-0340	Community Services	1/5/2026	3/31/2026
C3787		Impact NW	\$81,354.05	CHSP Case Management (limited duration)	Community Services	1/12/2026	3/31/2026
C3783		Trash for Peace	\$24,762.00	Youth services at East County sites, including summer camp programs	Community Services	1/16/2026	12/31/2026
C3789		PDX Nutrition Services	\$146,739.24	Meal services for CHSP; Rule 46-0340	Community Services	1/16/2026	3/31/2026
C3793		RADgov Inc.	\$100,000.00	On-call temp labor staffing & direct hire recruiters	HR	1/16/2026	1/5/2031
C3786		NARA	\$822,536.00	Admin of RLRA (25-26)	Rent Assistance	1/22/2026	6/30/2026
C3731		B2G Now	\$33,684.80	UBE Tracking Software; Rule 47-0288	Procurement	1/22/2026	3/31/2026
C3782		Meals on Wheels People	\$17,000.00	Meal delivery for BCC	Community Services	1/22/2026	12/31/2025
C3792		Infojini Inc.	\$100,000.00	On-call temp labor staffing & direct hire recruiters	HR	1/22/2026	1/5/2031
C3794		A & Associates Inc.	\$100,000.00	On-call temp labor staffing & direct hire recruiters	HR	1/22/2026	1/5/2031
C3797		Amanda Morris	\$35,551.00	Foot care at multiple properties	Community Services	1/22/2026	12/31/2026
C3799		Cascade Environmental Solutions	\$2,140.00	Cesar radon testing	DCR	2/4/2026	4/1/2026
C3810		Birdee Media	\$25,000.00	Content creation, website hosting and maintenance for Worth It	Executive	2/4/2026	12/31/2027
C3808		GTG Consultants, Inc	\$5,000.00	Updated CNA at The Jeffrey	Asset Management	2/5/2026	8/31/2026
C3809		GTG Consultants, Inc	\$7,800.00	Updated CNA of East Burnside apartments	Asset Management	2/5/2026	8/31/2026

C3814		Megan Ashlock	\$42,400.00	Youth leadership academy	Community Services	2/25/2026	12/31/2026
C3820		GTG Consultants, PC	\$10,900.00	CNA at NW Tower & Annex	Asset Management	2/26/2026	9/1/2026
Subtotal			\$1,772,855.98				18

PROFESSIONAL SERVICE CONTRACTS (A&E)

Contract #	Amend #	Contractor	Contract Amount	Description	Dept.	Execution Date	Expiration Date
C3796		Forensic Building Consultants	\$13,906.00	Design services to reconstruct the trash enclosure for Sequoia Square Apartments	DCR	1/26/2026	2/15/2027
Total			\$13,906.00				1

AMENDMENTS TO EXISTING CONTRACTS

Contract #	Amend #	Contractor	Contract Amount	Description	Dept.	Execution Date	Expiration Date
C2857	18	Bremik Construction	\$116,528.60	Additional scope, additional time	DCR	1/5/2026	3/1/2026
C3408	2	Soluna Career Consulting	\$-	Career coaching; amended to extend contract	Talent & Organizational Development	1/6/2026	12/31/2026
C3109	3	Nancy Davis Consulting	\$-	Strategist & Facilitation Consultant; amended to add time	Executive	1/12/2026	12/31/2026
C3299	3	Forensic Building Consultants	\$12,000.00	Extend contract duration - Floresta Apts permit	DCR	1/12/2026	2/28/2026
C3304	11	Baldwin General Contracting Inc	\$231,792.31	PCCO #013 Multiple C/O's for Additional Funds	DCR	1/12/2026	4/1/2026
C2662	5	Trash for Peace	\$3,819.00	Resident support and services for Clackamas County; amended to extend contract	Community Services	1/16/2026	6/30/2026
C2880	3	Allied Systems NW	\$-	On-Call Maintenance Repair Services; amended to extend contract	Property Management	1/16/2026	11/30/2026
C3258	2	Save First Financial Wellness	\$10,000.00	Financial Education and Credit Counseling for GOALS participants; amended to extend contract	Community Services	1/16/2026	12/31/2026
C3740	1	C. Bailey Associates	\$29,675.00	Youth Theater Camp Workshops; amended to add 2026 workshops	Community Services	1/16/2026	8/8/2026
C2448	15	O'Neill/Walsh Community Builders	\$-	Killingsworth extending duration	DCR	1/22/2026	12/31/2026
C3250	8	Holst Architects	\$112,710.00	ASR 4, redesign scope for ELC	DCR	1/22/2026	5/1/2029

C3304	12	Baldwin General Contracting Inc	\$42,935.15	PCCO #015 Multiple C/O's for Misc. Framing Repairs	DCR	1/22/2026	4/1/2026
C3493	3	KPFF Consulting Engineers	\$9,300.00	Provide a pre-construction ALTA survey Broadway corridor	DCR	1/22/2026	12/31/2026
C3538	2	Trash for Peace	\$23,936.00	Weekly youth services at Gateway, Gladstone, Sequoia, and Multnomah Manor; amended to extend contract	Community Services	1/26/2026	12/31/2026
C3559	1	Carbonell Cleaning Solutions	\$12,096.00	Custodial cleaning services at Gallagher Plaza	Property Management	1/26/2026	1/26/2027
C3560	1	Carbonell Cleaning Solutions	\$13,809.00	Custodial cleaning services at Williams Plaza	Property Management	1/26/2026	1/28/2027
C3561	1	Carbonell Cleaning Solutions	\$9,072.00	Custodial cleaning services at Medallion	Property Management	1/26/2026	1/28/2027
C3687	3	Pacific Sun Construction	\$-	Extending duration additional week	DCR	1/26/2026	2/13/2026
C3534	1	Home Instead Senior Care	\$41,490.00	extending contract duration to cover gap between programming changes for personal care and housekeeping services at CHSP sites	Community Services	1/27/2026	3/31/2026
C3629	2	Cascade Environmental Solutions	\$-	Contract extension. Demo is projected late 2026.	DCR	1/27/2026	12/31/2026
C2965	14	LMC, Inc	\$67,565.31	Scope changes	DCR	1/28/2026	2/1/2027
C3303	7	Bremik Construction	\$54,816.00	GCS CO #01	DCR	1/28/2026	6/30/2027
C3687	4	Pacific Sun Construction	\$22,273.87	Cesar Apts interior mods CO #02	DCR	1/29/2026	3/31/2026
C2992	2	CSG Advisors, Inc.	\$12,500.00	Financial advisory for faircloth to RAD for Peaceful Villa	DCR	1/30/2026	5/1/2027
C3706	1	Centric Elevator	\$-	Sellwood center emergency elevator door repair; amended to add time	Property mgmt	1/30/2026	6/30/2026
C3729	1	Prime Legacy	\$-	Sellwood Center to install a fence and gate on the exterior of the property; amended to add time	Property mgmt	1/30/2026	5/30/2026
C3551	1	A Hive, Inc	\$-	On-call coaching and facilitating; amended to add time	T&OD	2/3/2026	12/31/2026
C3687	5	Pacific Sun Construction	\$48,242.45	Cesar Apts interior mods CO #04	DCR	2/3/2026	3/31/2026
C3687	6	Pacific Sun Construction	\$8,415.68	Cesar Apts interior mods CO #05	DCR	2/3/2026	3/31/2026
C3548	1	Carbonell Cleaning Solutions	\$19,075.20	Custodial cleaning services at Sellwood Center; amended to extend contract	Property Management	2/4/2026	2/14/2027
C3296	1	Emma Inc.	\$3,145.80	Email marketing platform; amended to extend contract	Executive	2/9/2026	1/31/2027
C3806	1	To Do's Maintenance	\$2,729.00	Add countertops to scope	Property Management	2/11/2026	3/3/2026
C3569	1	Trash for Peace	\$7,120.34	Youth Services at The Ellington; amended to extend contract	Community Services	2/13/2026	2/28/2026

C3303	8	Bremik Construction	\$64,462.00	GMP CO #2	DCR	2/18/2026	6/30/2027
C3304	13	Baldwin General Contracting Inc	\$194.65	PCCO #016 Install New Light Switch in Storage Closet bldg A	DCR	2/18/2026	4/1/2026
C3451	3	Idea Language Services LLC	\$15,000.00	Translating SharePoint and accompanying forms; amended to extend contract	T&OD	2/18/2026	9/4/2029
C3251	11	Hacker Architects	\$6,000.00	ASR 15, engineering associated with changes	DCR	2/20/2026	6/30/2027
C2920	3	Universal Lawncare Maintenance	\$37,920.00	Landscaping Maintenance for Master-Leased Properties; amended to extend contract	Asset Mgmt	2/23/2026	12/31/2026
C3628	1	Soluna Career Consulting	\$3,000.00	Worth It' curriculum development for Home Forward youth age 18-24, focus on finances, employment, education, and leadership; amended to extend contract	Community Services	2/25/2026	12/31/2026
Subtotal			\$1,041,623.36				39

OTHER AGREEMENTS (Revenue contracts, 3rd Party contracts, MOU's, IGA's)

Contract #	Amend #	Contractor	Contract Amount	Description	Dept.	Execution Date	Expiration Date
Subtotal			\$0.00				0
Total			\$3,226,603.44				74

**Procurement & Contracts Department
FUTURE FORMAL PROCUREMENTS
Look Ahead - March 2026**

Estimated Contract Amount	Description	Dept.	Solicitation Period
\$500k	Goose Hollow Apts Renovations	DCR	March 2026
\$13 million	Madrona Rehab	DCR	March/April 2026
TBD	Townhouse Terrace Construction Project	DCR	2026
TBD	Slavin Court Construction Project	DCR	2026
TBD	Agency-wide legal services	Exec	Fall 2026
\$350k	Demolition at North Maryland	DCR	TBD
\$1.5 million	CHSP Housekeeping & Personal Care	Community Services	TBD
\$1.650 million	A&E for N. Maryland	DCR	TBD
\$13.2 million	CM/GC for N. Maryland	DCR	TBD