



26 Home Forward employees volunteered for the 48th annual Camp Rosenbaum at the Oregon Coast.

Board of Commissioners Meeting

Location:

Multnomah County Building
501 SE Hawthorne Blvd
Portland, Oregon 97214

Date & Time:

August 21, 2018
6:15 PM

PUBLIC NOTICE:



Home Forward
BOARD OF COMMISSIONERS
will meet on
Tuesday, August 21, 2018
At 6:15 pm
At the Multnomah County Building
501 SE Hawthorne Blvd.
In the Board of Commissioners Room



MEMORANDUM

To: Community Partners

Date: August 15, 2018

From: Michael Buonocore, Executive
Director

Subject: Home Forward Board of
Commissioners August Meeting

The Board of Commissioners of Home Forward will meet on Tuesday, August 21, 2018 at the Multnomah County Building, 501 SE Hawthorne Blvd., in the Board of Commissioners Room, at 6:15 P.M. The commission meeting is open to the public.

The meeting site is accessible, and persons with disabilities may call 503.802.8423 or 503.802.8554 (TTY) for accommodations (e.g. assisted listening devices, sign language, and/or oral interpreter) by 12:00 P.M. (noon), Friday, August 17, 2018.

AGENDA



BOARD OF COMMISSIONERS MEETING

MULTNOMAH COUNTY BUILDING
COMMISSIONERS BOARD ROOM
501 SE HAWTHORNE BLVD.
PORTLAND, OREGON

AUGUST 21, 2018 6:15 PM

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 July 17, 2018 Board of Commissioners Meeting

REPORTS / RESOLUTIONS

Following Reports and Resolutions:			
18-08	Topic	Presenter/POC	Phone #
01	Authorize Ratification of the Collective Bargaining Agreement Between Home Forward and AFSCME Council 75, Local 3135	Melissa Richardson	503.802.8529
REPORT	Annual Procurement and Equity Report	Berit Stevenson Peter Garcia	503.802.8541 503.802.8549

EXECUTIVE SESSION

The Board of Commissioners of Home Forward may meet in Executive Session pursuant to ORS 192.660(2), following their regularly scheduled Board of Commissioners meeting. 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.

THE NEXT MEETING OF THE BOARD OF COMMISSIONERS

The September Work Session will be on Wednesday, September 5 at 5:30 PM. The meeting will take place at Home Forward, 135 SW Ash Street in the Columbia Room. The next Board of Commissioners meeting will be Tuesday, September 18, 2018 at 6:15 PM. This meeting will take place in Gresham at Gresham City Hall, 1333 NW Eastman Parkway.

ADJOURN

MINUTES



BOARD OF COMMISSIONERS MEETING
HOME FORWARD
501 SE Hawthorne Street—Portland, Oregon
July 17, 2018

COMMISSIONERS PRESENT

Chair Miki Herman, Vice Chair and Treasurer Damien Hall, Commissioners Richard Anderson, TomiRene Hettman, Jenny Kim and Vivian Satterfield

STAFF PRESENT

Carolina Abdallah, Elise Anderson, Peter Beyer, Michael Buonocore, Tim Collier, Ian Davie, Dena Ford-Avery, Kim Gerhardt, Kitty Miller, Melissa Richardson, Molly Rogers, Kandy Sage, Berit Stevenson, Celia Strauss, Jonathan Trutt

COUNSEL PRESENT

Sarah Stauffer Curtiss

Chair Miki Herman convened the meeting at 6:15 PM.

PUBLIC COMMENT

No public comment.

MEETING MINUTES

Minutes of the June 19, 2018 Board of Commissioners Meeting

Chair Miki Herman requested a motion authorizing approval of the minutes to the June 19, 2018 Board of Commissioners meeting. Commissioner Richard Anderson moved to adopt the minutes and Vice Chair Damien Hall seconded the motion.

The vote was as follows:

Chair Miki Herman—Aye
Vice Chair/Treasurer Damien Hall—Aye
Commissioner Richard Anderson —Aye
Commissioner TomiRene Hettman—Aye
Commissioner Jenny Kim—Aye

Commissioner Vivian Satterfield—Aye

MISSION MOMENT

Lift Urban Portland

Kim Gerhardt, Community Services Program Manager introduced the Mission Moment. Gerhardt opened by saying food security is a very important determinant of one's health. Here at Home Forward we have been working with community partners such as Lift Urban to help decrease food insecurity and create community with our properties in downtown Portland. As a partner agency of the Oregon Food Bank, Lift Urban's mission is to reduce hunger and improve the lives of low income residents living in Northwest and downtown Portland.

Lift Urban touches eleven of our downtown high rise communities, as well as the Bud Clark Commons. Last year they provided 22,955 meals to residents in Home Forward buildings through Delivered Food Boxes, Emergency Food Closets and Supper Club.

Gerhardt introduced Lift Urban's board Vice President Brian Fleener. Fleener thanked the board for the invitation to present. Their mission is to reduce hunger and improve the lives of low income residents in the northwest and downtown areas. The need is astounding. Our story and mission resonate with people. We have 20 buildings in the downtown area we serve. There is one property that has been adopted by a corporate sponsor, with an annual financial commitment of \$5000 and where employees help pack and deliver food boxes. Fleener went on to say that this involvement has lifted the spirits of the employees.

Fleener thanked Home Forward for their ongoing support and growing the relationship over time. Gerhardt added for now they only serve downtown properties, but according to Fleener their long term strategy is to expand to the eastside.

Commissioner Jenny Kim asked how the relationship with the Oregon Food Bank worked. Fleener said they purchase most of the food from the Oregon Food Bank. New Seasons also offers a match.

Responding to Chair Herman's question about expanding a week's worth of supply to two weeks, would take more dollars and volunteers said Fleener. He added that they are looking at a phone app like Uber that could handle pickup and delivery. Gerhardt added that some properties don't have the refrigeration and storage to accommodate two weeks of food.

As Chair Herman noted, with the dramatic increase of food insecurity expanding partners such as Costco who have a presence in the community could be valuable. She thanked the presenters.

CONSENT CALENDAR

RESOLUTION 18-07-01 Authorize an Intergovernmental Agreement with the State of Oregon Department of Human Services to Continue Management Services for Community Integration Project Homes

Celia Strauss read the title of the resolution on the Consent Calendar. There being no questions, Chair Miki Herman requested a motion to approve. Commissioner Jenny Kim moved to adopt the Consent Calendar, Commissioner Richard Anderson seconded the motion.

The vote was as follows:

Chair Miki Herman—Aye
Vice Chair/Treasurer Damien Hall—Aye
Commissioner Richard Anderson —Aye
Commissioner TomiRene Hettman—Aye
Commissioner Jenny Kim—Aye
Commissioner Vivian Satterfield—Aye

REPORTS

Square Manor Post-Project Evaluation Report

Jonathan Trutt, Development Director presented the report. He said there is no board action. As the Contract Review Board, we are required to report back at the conclusion of a project. Trutt described the practice of using an alternative contracting method adding that Square Manor is a joint effort by the Procurement and Development departments.

Trutt said Square Manor was a renovation project of Gladstone Square and Multnomah Manor. The project included a mixture of financing with an initial construction budget of \$6,000,000. As work progressed, there was a need to replace the sewer lines at Multnomah Manor. It was a labor-intensive process and required residents to be relocated. The additional work was approximately \$2.5 million. We received favorable tax credit financing and dollars from permanent loan proceeds that covered the increase costs.

Given the scope escalation, supervisory cost increases due to the new scope of work, plus a delay in HUD approvals, the budget for project supervision was 50% more than

initially expected, which equates to 3% of the total contract value. The project achieved 55% participation by MWESB subcontractors and 12% participation Section 3 contractors. Overall, the design build is the best value and we exceeded our equity goals.

Berit Stevenson, Procurement Manager added that State law has changed the format for reporting these numbers. This is the first time we have used it and would welcome comments. This was a superstar project, we don't always get these high numbers.

Commissioner Jenny Kim asked why this project had so many MWESB. Stevenson responded that it was the first time we worked with LMC and they have great connections in the field. Commissioner Vivian Satterfield was interested in these numbers and how the goals are set. Stevenson said that construction contracts over \$200,000 include workforce goals. The workforce program includes a goal of 20% of the labor hours to be worked by apprentices. We mimic the goals set by the City of Portland and through a contract with the City, they help us manage and monitor our construction projects. Some projects, depending on funding, also include a Section 3 overlay, which is that 30% of the new hires (typically the apprentices) be section 3 individuals. Lastly, there are also goals for minority and women labor. Routinely we have a difficult time meeting women and minority goals in the current environment, but we have those numbers available. We typically meet the apprentice goals.

Commissioner Anderson was curious about the \$300,000 overrun. Stevenson indicated that the estimate for supervisor costs that did result in the \$300,000 overrun was an estimate, which we received from LMC. Stevenson indicated it is the responsibility of the project manager to be cognizant of this initial estimate and how this cost trends during the course of the project. Trutt said that given a five-month delay with the financing, the delays at the HUD level, the \$300,000 overrun was understandable. In addition, that LMC held their price during this delay was a great help to the project. Chair Herman appreciated the clarification. It was good we had a contractor that dealt with this and appreciates the future planning.

RESOLUTIONS

RESOLUTION 18-07-02 Authorize Change Order Amendment to C1719 for NE Grand Development

Development Director Jonathan Trutt set the stage and described the project location. The construction contract is for \$48.6 million. He said change orders are inevitable and we plan for them with field conditions or improving quality and proceeded to describe how these unanticipated things can come up. This change order for \$203,771 will amend the

design-build contract. The READ Committee has reviewed and their comments have been incorporated in the resolution.

There being no questions, Chair Miki Herman requested a motion to approve. Commissioner Richard Anderson moved to adopt Resolution 18-07-02, Commissioner TomiRene Hettman seconded the motion.

The vote was as follows:

Chair Miki Herman—Aye
Vice Chair/Treasurer Damien Hall—Aye
Commissioner Richard Anderson —Aye
Commissioner TomiRene Hettman—Aye
Commissioner Jenny Kim—Aye
Commissioner Vivian Satterfield—Aye

RESOLUTION 18-07-03 Authorize Alternative Procurement Findings for Fountain Place

Berit Stevenson presented the resolution saying this is the beginning of a new project. Fountain Place is a five story, 80-unit building on SW Salmon. The building is approximately 106 years old with unreinforced masonry housing a combination of working class and elderly and disabled residents that require additional services. We received a \$5 million grant from Oregon Housing and Community Services, with additional funding from Home Forward equity and low income housing tax credits for a total contract budget of \$11,290,000.

We feel the design-build approach is best. Given the structural renovations, we anticipate relocation of the residents. With the constraints of a downtown location and building code requirements having a single source contract for design and construction services is a good fit. The contractor will be selected through a competitive RFP process. As with previous contracts, we will look for a commitment to our target businesses and workforce hiring goals.

There being no questions, Chair Miki Herman requested a motion to approve. Commissioner Richard Anderson moved to adopt Resolution 18-07-03, Commissioner Jenny Kim seconded the motion.

The vote was as follows:

Chair Miki Herman—Aye
Vice Chair/Treasurer Damien Hall—Aye

Commissioner Richard Anderson —Aye
Commissioner TomiRene Hettman—Aye
Commissioner Jenny Kim—Aye
Commissioner Vivian Satterfield—Aye

ADJOURN

There being no further business, Chair Miki Herman adjourned the meeting at 6:55 PM.

Attached to the Official Minutes of Home Forward are all Resolutions adopted at this meeting, together with copies of memoranda and material submitted to the Commissioners and considered by them when adopting the foregoing resolutions.

Celia M. Strauss
Recorder, on behalf of
Michael Buonocore, Secretary

ADOPTED: AUGUST 21, 2018

Attest:

Home Forward:

Michael Buonocore, Secretary

Mary Ann Herman, Chair

RESOLUTIONS



MEMORANDUM

To: Board of Commissioners

Date: August 21, 2018

From: Melissa Richardson
Director, Business Services
503.802.8529

Subject: Ratification of the Tentative
Collective Bargaining Agreement
between Home Forward and the
AFSCME Local 3135
Resolution 18-08-01

The Board of Commissioners is requested to approve Resolution 18-08-01 ratifying the tentative collective bargaining agreement between Home Forward and AFSCME Local 3135. AFSCME, the American Federation of State, County, and Municipal Employees represents 164 employees performing professional and paraprofessional work at Home Forward.

ISSUE

On July 18, 2018 Home Forward and AFSCME reached a tentative agreement on a successor labor contract which will expire on December 31, 2020. The two year, nine-month agreement allows Home Forward to align the length of the contract with Home Forward's new calendar year fiscal year. The prior three-year agreement expired on March 31, 2018.

Home Forward management staff worked together with representatives from AFSCME over thirteen sessions to reach a financial settlement and agreement on a range of administrative topics. All employees in AFSCME as of April 1, 2018 will receive an increase to their base wage of 5% retroactive to April 1, 2018, and a one-time lump sum bonus of \$500. In the second and third year of the labor agreement, all employees will receive a 3% increase to their base wage. The total cost of the financial settlement is estimated at \$1,192,210.

AFSCME had 86 of their members vote on the tentative agreement. Of the 86 members that voted; 79 voted to ratify the agreement, 6 voted against ratification and one member abstained from the vote.



RESOLUTION 18-08-01

RESOLUTION 18-08-01 AUTHORIZES THE RATIFICATION OF THE COLLECTIVE BARGAINING AGREEMENT BETWEEN HOME FORWARD AND THE BUILDING TRADES COUNCIL

WHEREAS, it is the policy of Home Forward to recognize the right of its employees to enter into a collective bargaining agreement under the Public Employees Collective Bargaining Act to govern their wages, hours and working conditions; and

WHEREAS, the former collective bargaining agreement between Home Forward and AFSCME expired on March 31, 2018; and

WHEREAS, the duly authorized representatives of Home Forward have met in negotiations meetings with representatives of AFSCME; and

WHEREAS, the representatives of Home Forward and AFSCME reached a tentative agreement on a successor labor contract;

NOW, THEREFORE, BE IT RESOLVED, the Board of Commissioners approved the ratification of the tentative collective bargaining agreements between Home Forward the Building Trades Council.

ADOPTED: AUGUST 21, 2018

Attest:

Home Forward:

Michael Buonocore, Secretary

Mary Ann Herman, Chair

ANNUAL PROCUREMENT AND EQUITY REPORT



MEMORANDUM

To: Board of Commissioners

Date: August 21, 2018

From: Berit Stevenson, Procurement
and Contracts Manager
503.802.8541

Subject: Annual Procurement and Equity
Report – FY 2018

Contracting Overview

The Procurement and Contracts Department works to meet Home Forward's contracting needs while ensuring both compliance with the law and compliance with our agency goals for contracting equity in support of local target businesses. This report will review the outcomes of these efforts in Fiscal Year (FY) 2018 by providing an overview of Home Forward's procurement activity, and how this activity relates to meeting agency goals for contracting with minority-owned, women-owned, and emerging small businesses (MWESB), employing a diverse and growing workforce on Home Forward construction projects, and meeting the contracting and hiring goals set forth in U.S. Department of Housing and Urban Development's (HUD) Section 3 program.

FY2018 Activity

In FY 2018, the Procurement department processed 138 new contracts and 176 amendments to existing contracts for a total of 314 contract activities. This is a 28% increase of total contracts from the prior fiscal year. Figure 1 below depicts the contracting activity levels within each procurement category, as well as the total dollar values.

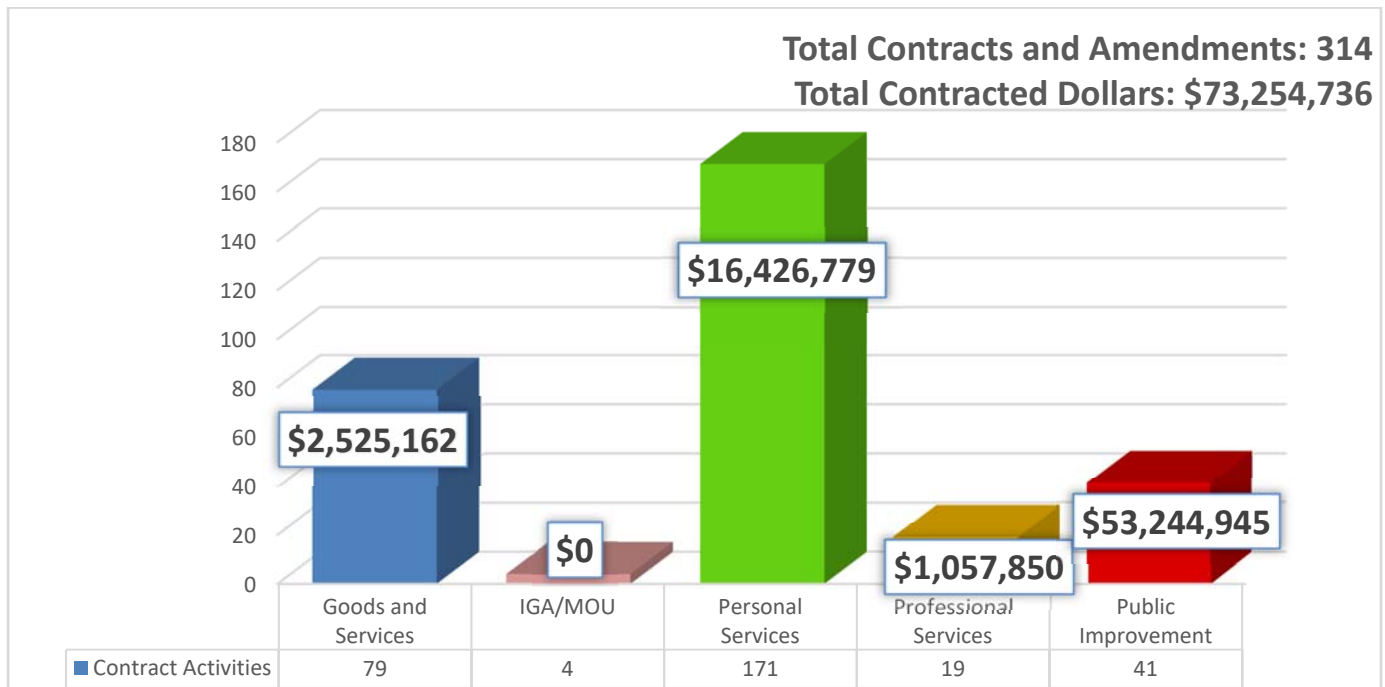


Figure 1. FY 2018 Contract and Amendment Activity

The Procurement and Contracts staff prepares a monthly contract report to keep the Board of Commissioners abreast of Home Forward’s contracting activities. These reports contain information on all new contracts and amendments. Additionally, contract activities in excess of \$100,000 require Board approval prior to execution.

Economic Equity in Procurement and Contracting

History

In 2002, the Home Forward Board of Commissioners established the agency’s *Economic Participation in Contracting Policy*. The policy established an aspirational goal for directing 20% of overall contracting dollars toward MWESB contractors.¹ In 2012, the Board of Commissioners adopted Resolution 12-03-04, revising and renaming the policy into its present iteration, the Home Forward *Economic Equity Policy*. The revision included requirements related to Section 3 of the HUD Act of 1968, as amended in 1994. Section 3, as it is commonly referred to, requires that Home Forward ensures employment, training, contracting and other economic opportunities generated by fiscal support from HUD shall, “to the greatest extent feasible, and consistent with Federal, State and local laws and regulations, be directed to low- and very low-income persons, particularly those who are recipients of

¹ Contractors designated as a Minority-Owned Business Enterprise, Women-Owned Business Enterprise, or an Emerging Small Business as certified by the State of Oregon’s Certification Office for Business Inclusion and Diversity (COBID) program.

government assistance for housing, and to business concerns which provide economic opportunities to low- and very low-income persons.”²

In 2017, the Procurement Department adapted a new methodology in reporting its contracting equity data to better reflect the agency’s contracting goals and prevailing practices of other public agencies. This new methodology now includes contract types such as emergency contracts, sole source and property management agreements, which were previously excluded in calculating contracting equity outcomes. The methodology also excludes intergovernmental agreements/memorandums (IGA/MOU) and contracts with non-profit agencies as these entities are not by definition able to become certified. As a result, 44 of the 314 contract activities from FY 2018 have been omitted from the equity calculations, leaving only contract activities with for-profit businesses.

MWESB Participation Outcomes

In FY 2018, Home Forward awarded 24% of its contracting dollars to local MWESB firms, exceeding the aspirational goal of directing 20% of contracting dollars to local MWESB firms.

Figure 2 below shows MWESB participation for FY 2018. The upper half represents all non-construction activity, while construction (Public Improvement) contracting is represented in the lower half. Figures 3-5 break down contracting activity and MWESB participation by procurement category, and disaggregate the percentages of contract dollars awarded to minority-owned, women-owned and emerging small businesses respectively.

Economic Equity Contracting Outcomes - Fiscal Year 2018				
Personal Services Professional Services and Goods & Services	Number of Contracts & Amendments	Total Contract Amount	Total Amount of MWESB Contracting Dollars	Percent MWESB Utilization
Direct Appointment	113	\$ 1,552,800	\$ 21,688	1%
Intermediate	67	\$ 1,956,154	\$ 293,320	15%
Formal	49	\$ 5,930,032	\$ 506,415	8%
Subtotal	229	\$ 9,438,986	\$ 821,423	9%
Public Improvement	Number of Contracts & Amendments	Total Contract Amount	Total Amount of MWESB Contracting Dollars	Percent MWESB Utilization
Direct Appointment	5	\$ 5,460	\$ -	0%
Intermediate	21	\$ 272,387	\$ 163,892	60%
Formal	15	\$ 52,967,098	\$ 13,892,039	26%
Subtotal	41	\$ 53,244,945	\$ 14,055,931	26%
Total	270	\$ 62,683,931	\$ 14,877,354	24%

Figure 2. Fiscal Year 2018 Economic Equity Contracting Results

² 24 C.F.R. § 135.1.a (2017).

The overall 24% MWESB participation for FY2018 is a 9% decrease from the prior fiscal year, an anticipated difference based on the construction activity planned for this fiscal year. However, Home Forward contracts in FY 2018 directed more than twice as many dollars toward MWESB firms than in FY 2017. FY 2018 saw an increase of more than 300% in construction contracting dollars, largely due to the NE Grand Avenue project.

Disaggregate Contracting Equity Data by Procurement Type

The figures below illustrate the total spending and MWESB participation for each procurement category. The largest portion of MWESB contracting dollars—more than 60% of the total MWESB dollars contracted in FY2018—were directed to women-owned businesses.

Personal Services

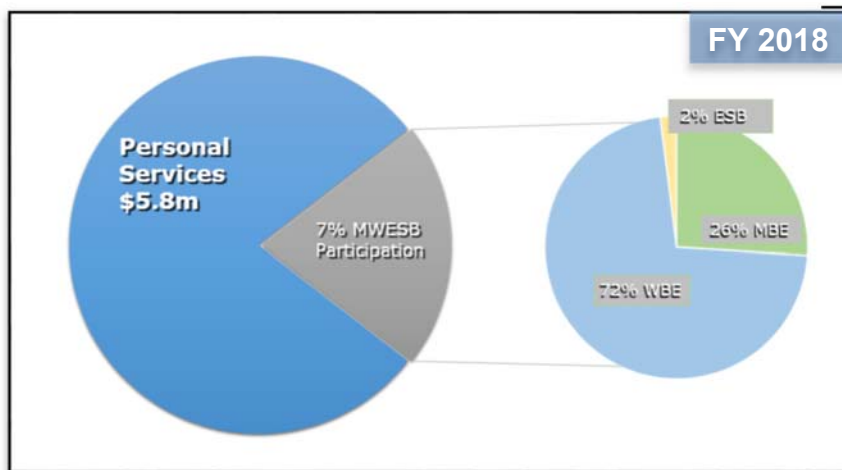


Figure 3 depicts the percentage of contracted dollars for Personal Services. This wide-ranging category includes attorneys, consultants, property management, and services for Home Forward residents.

Figure 3. Distribution of contracted Personal Services spending among MWESB firms

Personal Services Procurement Activities

FY2018	New Contract	Amendment
Formal	2	35
Informal	3	14
Direct Appt.	36	42
	132	

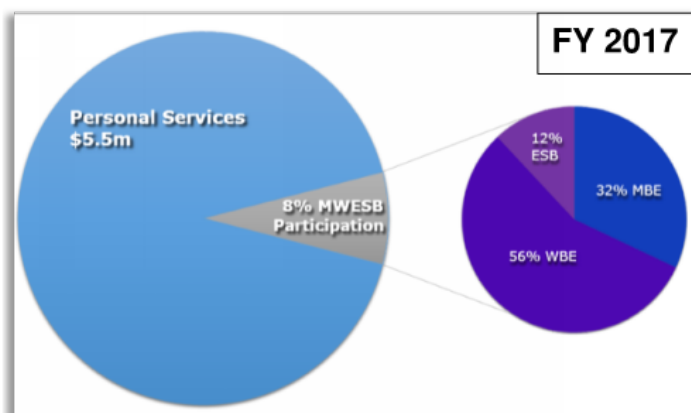


Figure 3.1. Distribution of contracted Personal Services spending among MWESB firms in FY 2017

Professional Services

Figure 4 shows the percentage of contracted dollars for Professional Services. This category is comprised of architectural and engineering services.

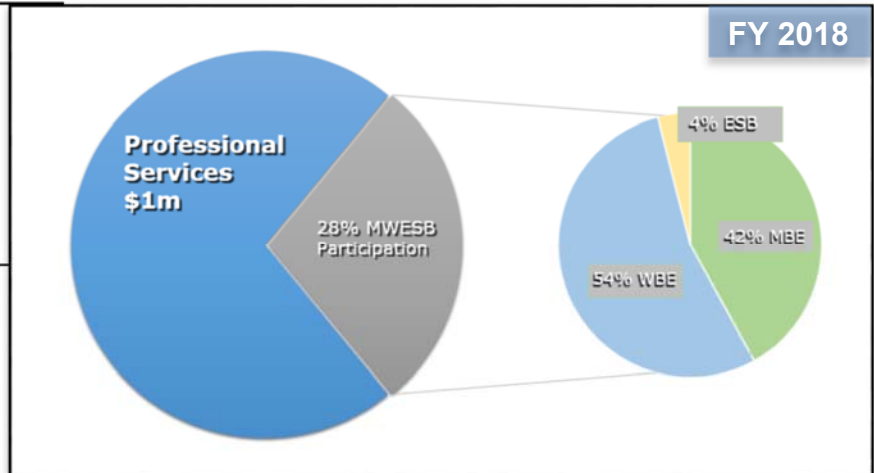


Figure 4. Distribution of contracted Professional Services spending among MWESB firms

Professional Services Procurement Activities

FY2018	New Contract	Amendment
Formal	2	6
Informal	1	3
Direct Appt.	7	0
Sole Source	0	0
	19	

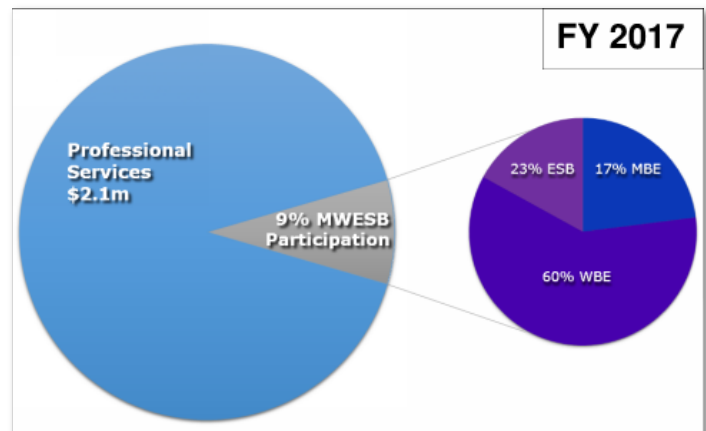


Figure 4.1 Distribution of contracted Professional Services spending among MWESB firms in FY 2017

Goods and Services

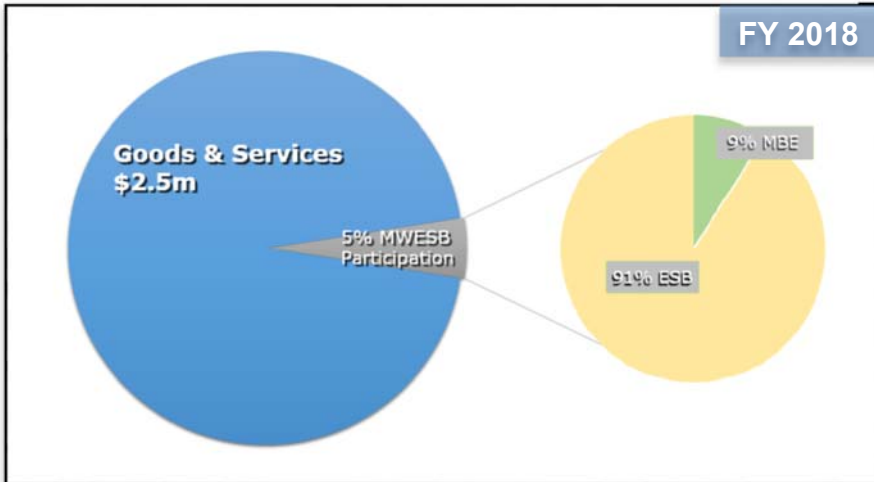


Figure 5 depicts the percentage of contracted dollars for Goods and Services. This category includes a variety of contracts for activities such as landscaping, elevator maintenance, security and abatement.

Goods and Services Procurement Activities

FY2018	New Contract	Amendment
Formal	3	1
Informal	20	26
Direct Appt.	18	10
Sole Source	0	0
	78	

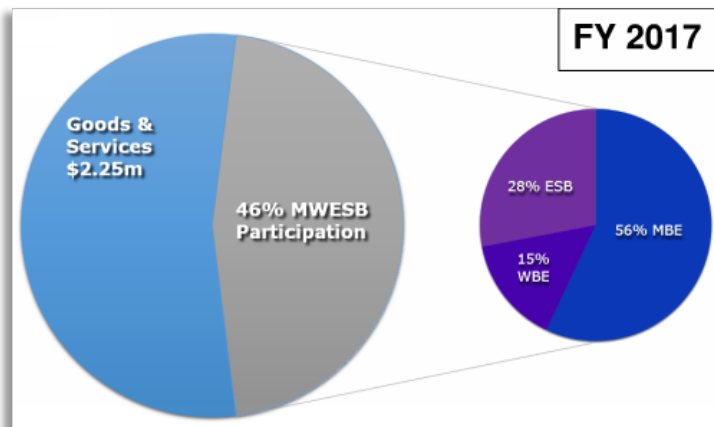


Figure 5.1. Distribution of contracted Goods and Services spending among MWESB firms in FY 2017

Public Improvement

Figure 6 depicts the breakdown of contract dollars among MWESB contractors on Public Improvement contracts. MWESB participation on the NE Grand Ave project accounts for 95% of the participation in FY 2018.

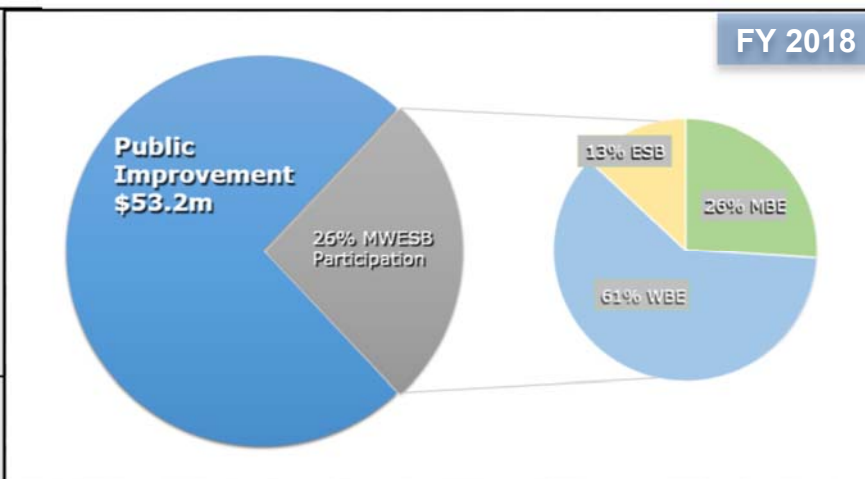


Figure 6. Distribution of contracted Public Improvement spending among MWESB firms

Public Improvement Procurement Activities

FY2018	New Contract	Amendment
Formal	2	13
Informal	14	7
Direct Appt.	3	2
Sole Source	0	0
	41	

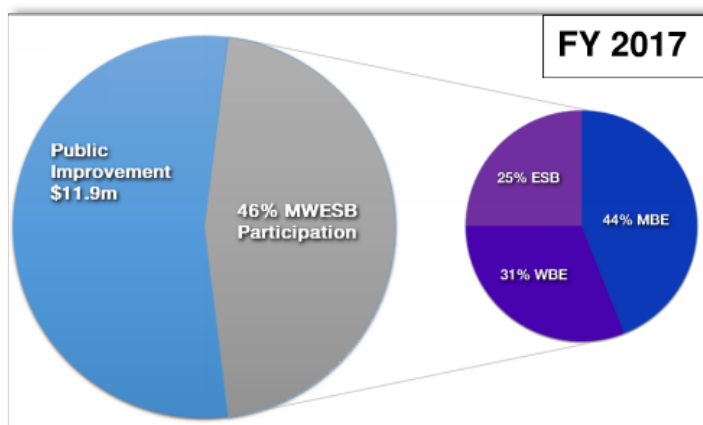


Figure 6.1. Distribution of contracted Public Improvement spending among MWESB firms in FY 2017

Of the nearly \$15,000,000 awarded to MWESB in FY 2018, more than \$9 million was directed to women-owned businesses, and more than \$3.8 million toward minority-owned businesses.

Figure 7. Distribution of contracted spending among MWESB firms in FY 2018

Year-Over-Year Review

Reviewing contracting equity data from the previous three years shows that no two contracting years are exactly alike. Given the high dollar amounts of construction contracts, MWESB participation in this contracting category is a strong indicator of the agency's total participation figures. The new reporting methodology introduced in FY 2017 had the most significant effect on the participation figures for non-construction contracts, as property management contracts were included within Personal Services for the first time.

Contract Type	FY15	FY16	FY17	FY18	Four Year Average
Goods & Services, Personal Services, Professional Services MWESB Participation	8%	25%	15%	9%	14.25%
Public Improvement MWESB Participation	26%	27%	59%	26%	34.50%
Total MWESB Business Participation	23%	27%	37%	24%	27.75%

Figure 8. Four-year look back at contracting equity report data

Section 3

The economic equity goals targeting low- and very low-income residents per Section 3 of the Housing and Urban Development Act of 1968 are multi-pronged—extending beyond contracting activity—and include agency hiring practices and other economic-advancement opportunities through training and employment. Section 3 goals include:

- 10% of HUD-funded construction spending is directed toward Section 3 businesses
- 3% of HUD-funded non-construction spending is directed toward Section 3 businesses
- 30% of new hires are Section 3 residents³

HUD has previously required annual—based on the federal fiscal year—reporting of Section 3 performance to be submitted in January. Changes to the timing of Section 3 report submissions meant to correspond to Home Forward’s shift to a calendar-based fiscal year has resulted in two Section 3 reports being submitted since January 2018: a truncated report covering the period between October 1, 2016 and December 31, 2016, followed by another that captured all Section 3 activity in calendar year 2017. Below are the Section 3 contract spending and hiring outcomes for the end of 2016 and all of 2017.

Section 3 Outcomes

Contracts covered by Section 3 requirements are identified by tracking draws from the Capital Fund Program (CFP), or other federal funding streams, that partially or totally fund contract activity. In the report period from October 2016 through December 2016, contracts worth nearly \$9 million were identified. The table below shows the percentage of those dollars directed toward Section 3 businesses, as well as hiring data for both Home Forward and Section 3 covered contracts.

<u>Section 3 Covered Activity</u> <u>Oct 1, 2016 – Dec 31, 2016</u>	Moving To Work	
	<i>Construction</i>	<i>Non-Construction</i>
Total Dollar Amount of Construction Contracts Awarded	\$8,931,286	n/a
Total Dollar Amounts Awarded to Section 3 Businesses	\$915,964	n/a
% of the Dollars awarded to Section 3 Businesses	10%	n/a
New Hires	14	
Section 3 New Hires	3	
% of Section 3 New Hires	21.42%	

Figure 9. Section 3 outcomes during the truncated period of 10/1/16 – 12/1/16, submitted by HUD 60002 report in Dec 2017.

³ This requirement applies to both HUD-funded construction projects and Home Forward hiring.

As shown in Figure 9 above, Home Forward achieved the 10% target on construction contracting dollars to Section 3 businesses. No HUD funding supported non-construction contract activities in this reporting period. While the report fell short of achieving the 30% goal for new Section 3 hires, this is likely due to the short, 3-month truncated period of the report as Home Forward regularly exceeds the 30% goal in typical reporting cycles. In the period reported above, 11 of the new hires were Home Forward staff, as were all three reported Section 3 hires.

The following table shows the Section 3 activity throughout the 2017 calendar year.

Section 3 Covered Activity Jan 1, 2017 – Dec 31, 2017	Moving To Work	
	Construction	Non-Construction
Total Dollar Amount of Construction Contracts Awarded	\$341,840.25	\$404,550
Total Dollar Amounts Awarded to Section 3 Businesses	\$104,164.77	\$0
% of the Dollars awarded to Section 3 Businesses	30.47%	0%
New Hires	70	
Section 3 New Hires	32	
% of Section 3 New Hires	45.71%	

Figure 10. Section 3 outcomes during the period of 1/1/17 through 12/31/17, submitted by HUD 60002 report in July 2018.

Home Forward exceeded both the 10% goal for dollars awarded to Section 3 businesses and the 30% Section 3 hiring goal. Thirty seven of the 70 new hires reported are Home Forward employees, with 33% qualifying as Section 3 hires. The remaining new hires occurred under Section 3 covered construction contracts. The non-construction activity reported, where Home Forward fell short of the Section 3 goal, is overwhelmingly attributed to legal costs associated with RAD conversions. As nearly all of the Section 3-certified businesses in the Portland area are in the construction trades, there are few opportunities to meet the 10% goal in this category when HUD funds are used to support non-construction contracts.

When reported numbers fall short of HUD targets, details of additional efforts toward Section 3 compliance are requested. This allows Home Forward to report on work beyond HUD-funded projects and other activities that promote Section 3 objectives. Additionally, HUD encourages the provision of “other training and employment related opportunities,” including but not limited to, “use of ‘upward mobility’, ‘bridge’ and trainee positions to fill vacancies...and hiring Section 3 residents in part-time positions.”⁴ Home Forward did contract more than \$3.4 million with Section 3-certified firms among four contracts that

⁴ 24 C.F.R. § 135.40.b (2017).

were not supported by federal dollars, and thus exempt from Section 3 requirements. The largest of these contracts, more than \$3 million for emergency repairs at Fairview Woods, performed by a Section 3 certified prime contractor. In addition to the contracting described above, the efforts of Home Forward's Greater Opportunities to Advance, Learn and Succeed (GOALS) program qualify as such economic opportunities and contribute to upward mobility for Home Forward residents and participants, providing access to financial literacy and credit repair workshops, as well as workshops and guidance around homeownership.

Workforce Training and Hiring

The Workforce Training and Hiring Program (WTHP) requires state-registered apprentices to work a minimum of 20% of the labor hours per trade on construction contracts over \$200,000 and subcontracts of no less than \$100,000. In addition to apprentice hours, Home Forward's program aims to increase the numbers of women and minorities in the construction trades. To meet the goals and program requirements, Home Forward contracts with the City of Portland to monitor job hours and provide reporting. In FY 2018, the City of Portland monitored 70,036 labor hours across five construction projects on behalf of Home Forward. Labor hours are recorded by trade along with data showing (1) hours worked by journey-level workers and apprentices, (2) hours worked by minority and female tradespeople, and (3) hours worked by Section 3 individuals as appropriate.

The five qualifying construction projects—Fairview Oaks' Exterior Cladding, Fairview Woods' Emergency Repairs, Gladstone Square and Multnomah Manor Rehab, NE Grand Ave, and the Harold Lee Village Rehab—either completed or began work over the course of FY 2018. While not every contractor met all of the Workforce goals on each project—an extremely rare occurrence—the four projects completed in this reporting period finished with at least 20% of the overall labor hours performed by apprentices. Most notably, the Gladstone Square and Multnomah Manor project, highlighted in last year's report for its high MWESB participation, achieved 24% apprentice participation and reported more than half of all its labor hours as performed by minority workers, and 12% performed by women. This was the only project among the five in this reporting year to meet the two aspirational goals. Three of the five projects met or exceeded the goal of 9% of hours performed by tradeswomen. Across all Home Forward projects in this reporting period, 28% of the total labor hours were performed by minority workers and 10% of all labor hours were performed by women.

	Total Hours in Reporting Period	Apprentice Hours	Apprentice Hours	Minority Hours	Minority Hours - 18% Goal	Female Hours	Female Hours - 9% Goal
Fairview Oaks Cladding	9448	2158	23%	0	0%	563	6%
Fairview Emergency	15127	3382	22%	952	6%	1817	12%
Gladstone Square	33613	8068	24%	18733	56%	3842	11%
Grand Ave	204.5	86	42%	0	0%	0	0%
Harold Lee Village	11648	2749	24%	14	0%	1027	9%
Totals	70040.5	16443	23%	19699	28%	7249	10%

Figure 11. Summary of labor hours performed on Home Forward projects in FY 2018.

Last year the Procurement and Contracts department participated in a regional construction workforce market study led by Metro. The Procurement department continues its involvement as the second phase of this project has just gotten underway. A Public Owners Work Group comprised of 15 other public agencies has formed and begun work on the development of a regional framework for expanding, supporting and sustaining the construction workforce in the Portland metro area that is diverse, inclusive and equitable. This work group held its first meeting in July, and will continue to meet regularly, and expects to deliver recommendations for consideration in mid-2019.

Conclusions

Procurement staff will continue working with contract and project managers to support contracting activities in compliance with federal and state requirements and to achieve Home Forward's MWESB contracting goals, as well as continue to support the diverse workforce and businesses in our community. As expected, overall MWESB participation results are dependent upon the agency's construction activity, and these figures continue to fluctuate depending not only on the amount of construction performed, but also the type of work and the building type.

Looking ahead, workforce development and equity is primed to move to the forefront of the conversations around equity in contracting among public owners in the Portland metro area. Keeping in step with the current emphasis on workforce development and equity, the Procurement department will continue its efforts as a member of the Public Owners Work Group as well as work diligently to achieve goals on Home Forward projects.

Additionally, staff of the Procurement and Contracting department intend to work with others at Home Forward to better communicate the activities and results of Home Forward's contract equity programs by posting such information on Home Forward's website. This step towards greater transparency and accountability will strengthen Home Forward's commitment to contracting equity and, in time, provide momentum toward better results.

STAFF REPORTS

Procurement & Contracts Department
MONTHLY CONTRACT REPORT
Contracts Approved 06/01/18 - 07/31/18

PUBLIC IMPROVEMENT
(CONSTRUCTION & MAINTENANCE SERVICES)

Contract #	Amend #	Contract Type (Hide)	Contractor	Contract Amount	Description	Dept.	Execution Date	Expiration Date
C2048	0	Public Improvement	Thanh Do	\$ 4,375.00	Restoration at NW Tower units #157 and #159	Property Management	6/26/2018	7/21/2018
C2055	0	Public Improvement	Kennedy Restoration	\$ 221,038.75	Emergency restoration of 4th-6th floors of Bud Clark Commons due to fire/flood damage	Property Management	7/10/2018	10/1/2018
C2007	0	Public Improvement	First Cascade Corporation	\$ 6,974.00	Repainting at Humboldt Gardens	DCR	7/12/2018	10/14/2018
C2067	0	Public Improvement	Cascade Radon Inc.	\$ 59,928.00	Radon mitigation at Maple Mallory	DCR	7/30/2018	10/31/2018
Subtotal				\$ 292,315.75				4

GOODS & SERVICES

Contract #	Amend #	Contract Type (Hide)	Contractor	Contract Amount	Description	Dept.	Execution Date	Expiration Date
C2034	0	Goods and Services	EngAGE, inc	\$ -	One semester of storytelling classes at 3 Home Forward sites	Community Services	6/1/2018	12/31/2018
C2040	0	Goods and Services	NW Enforcement	\$ 3,000.00	Security Services for Celilo Court	Property Management	6/5/2018	9/30/2018
C2038	0	Goods and Services	ValleyScapes Landscape Solutions	\$ 58,692.00	Landscaping services for Tamarack, Eliot Square, Camelia Court, Maple Mallory	Property Management	6/7/2018	6/30/2019
C2041	0	Goods and Services	Mountain View Tree Service	\$ 3,850.00	Tree service at Dekum, Carlton, and Celilo	Property Management	6/11/2018	8/15/2018
C2042	0	Goods and Services	Rich's Tree Service	\$ 3,185.00	Tree removal at Eliot Square	Property Management	6/20/2018	7/15/2018
C2046	0	Goods and Services	NW Enforcement	\$ 10,749.96	Security Services for Schrunck	Property Management	6/20/2018	6/14/2019
C2047	0	Goods and Services	NW Enforcement	\$ 10,749.96	Security Services for Dahlke	Property Management	6/20/2018	6/30/2019
C2044	0	Goods and Services	Pacific Lamp	\$ 1,727.00	LED lighting at Slavin Court	Property Management	7/10/2018	9/30/2018
C2050	0	Goods and Services	Snugs Services	\$ 1,041.18	Roof cleaning at Eliot Square	Property Management	7/10/2018	7/31/2018
C2064	0	Goods and Services	Alpha Environmental Services	\$ 1,090.00	Asbestos testing at Medallion	Property Management	7/25/2018	8/31/2018
C2065	0	Goods and Services	Alpha Environmental Services	\$ 13,040.00	Asbestos testing at Williams Plaza	Property Management	7/25/2018	9/1/2018

C2068	0	Goods and Services	Advanced Vertical Solutions (AVS)	\$ 50,000.00	Replacement of door rollers for Schunk Tower elevator	Property Management	7/25/2018	9/30/2018
C2066	0	Goods and Services	Charter Mechanical	\$ 3,156.00	Snake and camera outside the 14 stairwell drains at Maple Mallory Apartments	DCR	7/30/2018	12/31/2018
Subtotal				\$ 160,281.10				13

PERSONAL SERVICE CONTRACTS

Contract #	Amend #	Contract Type (Hide)	Contractor	Contract Amount	Description	Dept.	Execution Date	Expiration Date
C2053	0	Personal Service	Klink Consulting Group	\$ 10,000.00	Consulting for resident services redesign initiative	Executive	7/17/2018	6/30/2019
GO2056	0	Personal Service	CNA Specialists	\$ 3,000.00	CAN and forensic analysis\ for Westwind Apartments	DCR	7/10/2018	9/14/2018
C2057	0	Personal Service	Buzby Consulting	\$ 11,250.00	Coordinator for 2018 Moving to Work (MTW) Plan	Executive	7/6/2018	12/31/2018
C2058	0	Personal Service	Carolyn McKay	\$ 5,000.00	Foot care at Dahlke, Holgate House, Grace Peck, and Rosenbaum	Community Services	7/17/2018	12/31/2018
C2061	0	Personal Service	KSW Consulting	\$ 10,000.00	Excel training for Home Forward staff	Executive	7/23/2018	12/31/2019
C2035	0	Personal Service	PBS Engineering & Environmental, Inc.	\$ 10,000.00	Environmental Site Assessment at Tamarack, Camelia court, and Winchell court	DCR	6/6/2018	8/6/2018
C2043	0	Personal Service	Easbey Consulting, LLC	\$ 6,000.00	Produce 100% QTC's for Wests LP & Woods LP tenants	DCR	6/20/2018	8/31/2018
Subtotal				\$ 55,250.00				7

PROFESSIONAL SERVICE CONTRACTS (A&E)

Contract #	Amend #	Contract Type (Hide)	Contractor	Contract Amount	Description	Dept.	Execution Date	Expiration Date
C2039	0	Professional Services (A&E)	M.Thraillkill Architect LLC	\$ 26,880.00	Update master specifications and testing requirements	DCR	6/6/2018	1/31/2020
C1992	0	Professional Services (A&E)	TRC Environmental Corporation	\$ 2,275.00	Additional radon testing at Camelia and Winchell	DCR	6/8/2018	7/31/2018
C2045	0	Professional Services (A&E)	Interface Engineering, Inc.	\$ 17,500.00	Engineering services for the temporary modular housing for tenants being relocated during Tamarack remodel (Dwight)	DCR	7/10/2018	12/17/2018
C2060	0	Professional Services (A&E)	W.B. Wells & Associates, Inc.	\$ 78,000.00	Surveying at Hunter's Run, Floresta, Powellhurst, Alderwood, and Harold Lee Village	DCR	7/24/2018	11/30/2018
Total				\$ 124,655.00				4

AMENDMENTS TO EXISTING CONTRACTS

Contract #	Amend #	Contract Type (Hide)	Contractor	Contract Amount	Description	Dept.	Execution Date	Expiration Date
C1571	4	Goods and Services	Pest Solutions LLC	\$ 50,000.00	On-call pest control services, IRFP 04/15-280; amended to add funds	Prop Mgmt	6/1/2018	4/30/2020
C1999	1	Public Improvement	Epiphany Construction	\$ (148.00)	Reduction in costs for rehab work at Humboldt	Property Management	6/1/2018	6/15/2018
C1819	1	Professional Services (A&E)	Gill Group, Inc.	\$ 29,050.00	RAD: Physical Condition Assessment Statement of Work and Contractor Qualifications for Alderwood, Hunter's Run, Harold Lee, Floresta, Powellhurst, Tillicum North, Tillicum South	DCR	6/7/2018	6/30/2019
C1922	2	Goods and Services	Advanced Vertical Solutions (AVS)	\$ 50,000.00	Elevator Maintenance; amended to add funds	Property Management	6/11/2018	11/30/2018
C1613	4	Goods and Services	NW Enforcement	\$ 50,000.00	On-call security services, RFP 05/15-282	Prop Mgmt	6/20/2018	7/30/2019
C1857	1	Goods and Services	Signal 88 Security	\$ (49,049.00)	Security Services for Wubet Biratu, RPM portfolio of properties; amended to remove Tamarack, Dahlke, and Schrunck	Prop Mgmt	6/20/2018	7/31/2020
C1866	1	Personal Service	Michael Mangum Jr.	\$ -	Youth mentorship and leadership services for SCC	Community Services	6/20/2018	9/30/2018
C1961	1	Goods and Services	Performance Systems Integration (PSI)	\$ 783.70	Fire safety services at 12 properties; amended to add services for NW Towers	Property Management	6/20/2018	5/6/2019
C1970	1	Public Improvement	Cascade Radon Inc.	\$ -	Radon Mitigation at Harold Lee Village; amended to extend duration	DCR	6/20/2018	7/31/2018
C1971	2	Public Improvement	Cascade Radon Inc.	\$ -	Radon Mitigation at Alderwood; amended extend duration	DCR	6/20/2018	7/31/2018
C1650	7	Public Improvement	LMC, Inc.	\$ (355,457.00)	Final const reconciliation, deductive change order	DCR	6/26/2018	1/31/2018
C1709	4	Personal Service	John Keating	\$ 10,000.00	Grant writing, consultation and fund development at \$85/hr; amended to extend duration	Community Services	7/2/2018	12/31/2018
C1902	1	Personal Service	Inhance LLC	\$ -	Program design and implementation services; resume writing support services; amended to extend duration	Executive	7/2/2018	6/30/2018
C1726	2	Goods and Services	Teufel Nursery Inc	\$ 11,203.00	Landscape maintenance contract for Hollywood East	Prop Mgmt	7/3/2018	12/31/2019
C1749	7	Public Improvement	North Pacific Construction & Remodeling, Inc.	\$ 16,759.24	Final 3 change orders for Harold Lee Village	DCR	7/3/2018	3/31/2018
C2003	1	Public Improvement	Fulcrum Construction & Building Services LLC	\$ 13,680.00	Richmond Place Window Replacement; amended to add marble window sills and aprons	DCR	7/3/2018	9/30/2018
C2003	2	Public Improvement	Fulcrum Construction & Building Services LLC	\$ 30,630.00	Richmond Place Window Replacement; amended to add seal to all existing floor to ceiling windows	DCR	7/3/2018	9/30/2018
C1719	6	Public Improvement	O'Neill/Walsh Community Builders	\$ 90,531.00	GMP Amendment CO #5 - grand avenue apartments	DCR	7/9/2018	2/17/2020

C1942	1	Public Improvement	Endres Northwest Inc	\$ 6,900.00	Unit Remodel at Richmond Place; Kitchen in Unit 301	DCR	7/10/2018	8/31/2018
C1627	3	Personal Service	Portland Patrol, Inc	\$ -	Unarmed foot patrol for the Bud Clark Commons, contract extension	Prop Mgmt	7/13/2018	12/31/2018
C2035	1	Personal Service	PBS Engineering & Environmental, Inc.	\$ 4,950.00	Scope modification: performing sub-slab vapor and soil gas sampling mid-ESA at Camelia Court to determine whether historical use of offsite properties has impacted the Site.	DCR	7/20/2018	9/30/2018
T1332	1	Personal Service	Kantor Taylor McCarthy PC	\$ -	On-call legal services; amended to extend time	DCR	7/27/2018	7/31/2019
T1333	2	Personal Service	Foster Pepper LLC	\$ -	On-call legal services; amended to extend duration of contract	DCR	7/27/2018	7/31/2019
Subtotal				\$ (40,167.06)			23	

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

Contract #	Amend #	Contract Type (Hide)	Contractor	Contract Amount	Description	Dept.	Execution Date	Expiration Date
GO2036	0	Personal Service	CNA Specialists	\$ 2,900.00	CNA for Ash Street Courtyard	DCR	6/1/2018	8/30/2018
GO2037	0	Personal Service	PBS Engineering & Environmental, Inc.	\$ 2,930.00	PSA / fungal testing at Ash St Courtyard	DCR	6/1/2018	8/30/2018
C2059	0	IGA/MOU	Washington State University	\$ 82,807.00	IGA for a Fair Market Rent survey with WSU (FMR Study) portland/vancouver/hillsboro	Business Services	7/10/2018	1/31/2019
Subtotal				\$ 88,637.00			3	

Total **\$ 680,971.79** **54**

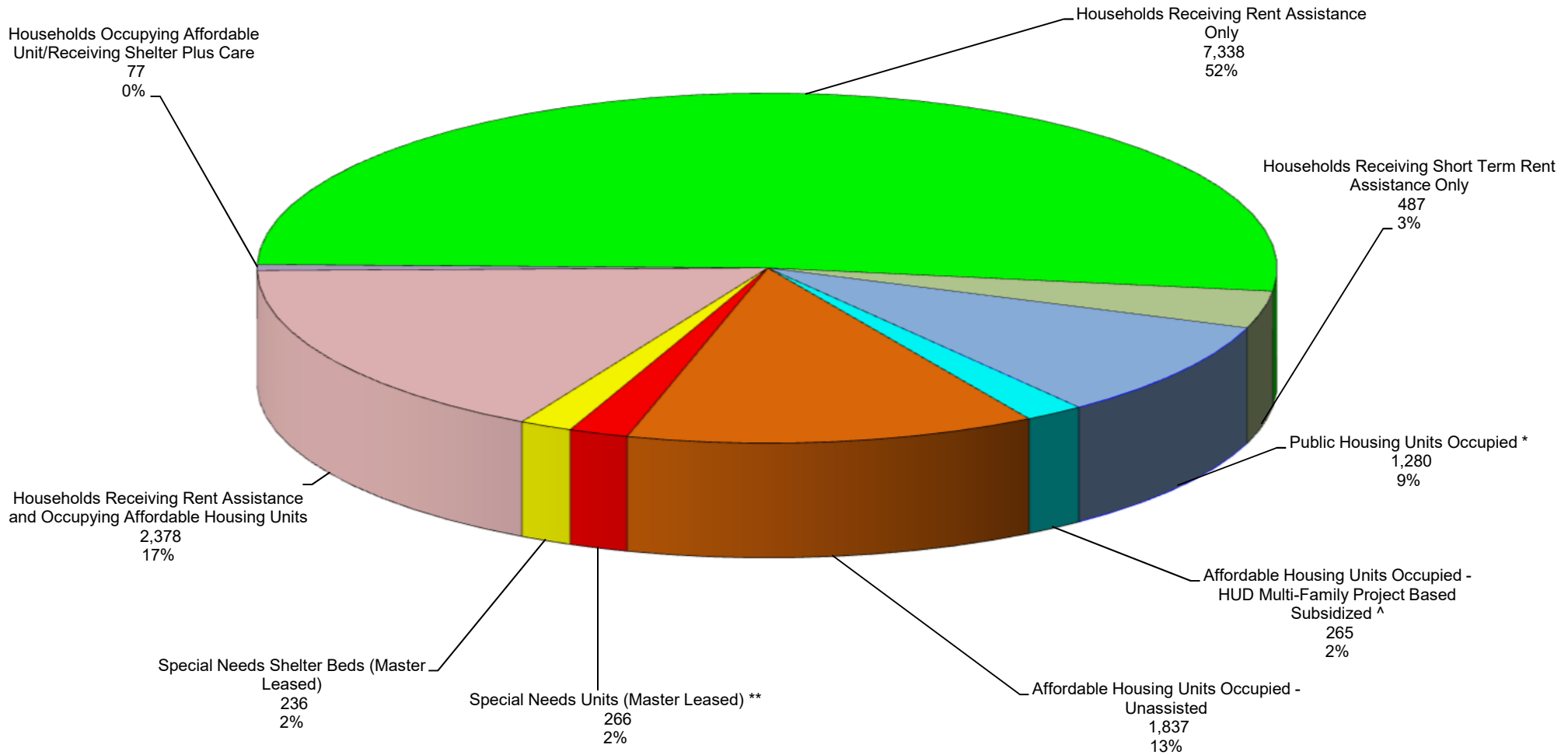
HOUSEHOLDS SERVED REPORT

Households Served			
Households Served Through Housing Supports July 2018			
Rent Assistance	All Programs	Moving to Work Programs	Non-MTW Programs
Rent Assistance Vouchers - Home Forward Funded	9,716	7,723	1,211
Tenant Based Vouchers	5,614	5,614	
Project Based Vouchers	1,461	1,461	
Hi Rise Project Based Vouchers	648	648	
RAD Project Based Vouchers	782		
Single Room Occupancy (SRO)/MODS	501		501
Family Unification Program	97		97
Veterans Affairs Supportive Housing (VASH)	556		556
Rent Assistance - PORT IN From Other Jurisdiction	57		57
Short Term Rent Assistance Programs	564	27	537
Shelter + Care	453		453
Locally Funded Short Term Rent Assistance	84		84
Earl Boyles	-	-	
MIF Funded Short Term Rent Assistance	-	-	
Alder School	15	15	
New Doors	5	5	
Employment Opportunity Program	7	7	
Work Systems Inc. - Agency Based Rent Assistance	-	-	
Total Rent Assistance	10,280	7,750	1,748
Subsidized Housing Units			
Public Housing Units Occupied	1,280	1,280	-
Traditional Public Housing units Occupied	1,280	1,280	
Affordable Housing Units Occupied (excluding PH subsidized)	4,557		4,557
Affordable Housing Units - Tenant Based Vouchers	505		505
Affordable Housing Units - Shelter + Care	77		77
Affordable Housing Units - Project Based Vouchers	329		329
Affordable Housing Units - Hi Rise Project Based Vouchers	648		648
Affordable Housing Units - RAD Project Based Vouchers	782		782
^ Affordable Housing Units - HUD Multi-Family Project Based	265		265
Affordable Housing Units - VASH Vouchers	76		76
Affordable Housing Units - Family Unification Program	2		2
Affordable Housing Units - Section 8 Port In	36		36
Affordable Housing Units - Unassisted	1,837		1,837
Special Needs	502		502
Special Needs Units (Master Leased) **	266		266
Special Needs Shelter Beds (Master Leased)	236		236
Total Households Occupying Housing Units	6,339	1,280	5,059
Total Housing Supports Provided to Household	16,619	9,030	6,807
Household Occupying Affordable Unit/Receiving Home Forward Rent Assistance	(2,378)		(2,378)
Households Occupying Affordable Unit/Receiving Shelter Plus Care	(77)		(77)
Total Households Served	14,164	9,030	4,352

Notes:

- ^ Consists of Grace Peck Terrace, Multnomah Manor, Plaza Townhomes, Rosenbaum Plaza, Unthank Plaza
- ** Special Needs are physical units as occupancy levels that are not reported to Home Forward by service providers master leasing these properties.
- Home Forward Board of Commissioners
August 2018

Total Households Served: Rent Assistance and Occupied Housing Units July 2018



Total Households Served 14,164

^ Consists of Grace Peck Terrace, Multnomah Manor, Plaza Townhomes, Rosenbaum Plaza, Unthank Plaza

* Includes Local Blended Subsidy

^^ Total Short Term Rent Assistance less the Households Occupying Affordable Units/Receiving Shelter Plus Care

** Special Needs are physical units as occupancy levels that are not reported to Home Forward by service providers master leasing these properties.

DASHBOARD REPORT

Property Performance Measures

	Number of Properties	Physical Units	Rentable Units	Vacant Units	Occupancy Percentage	Unit Mix					
						Studio/SRO	1 Bdrm	2 Bdrm	3 Bdrm	4 Bdrm	5+ Bdrm
Public Housing	33	1,310	1,300	30	97.7%	77	664	331	228	10	0
Affordable Owned	25	2,351	2,351	44	98.1%	857	704	578	182	30	0
Tax Credit Partnerships	20	2,278	2,278	28	98.8%	812	620	413	282	134	17
Total Affordable Housing	45	4629	4629	72	98.4%	1669	1324	991	464	164	17
Combined Total PH and AH	78	5939	5929	102	98.3%	1746	1988	1322	692	174	17
Special Needs (Master Leased)	29	266	266								
Special Needs (Shelter Beds)	3	236	236								
Total with Special Needs	110	6,441	6431								

* property/unit counts also included in Affordable Housing Count

Financial

Twelve months ending 3/31/2018

Fiscal YTD ending 3/31/2018				03/31/18		
# of Properties/units Positive Net Operating Income (NOI)		# of Properties/units Negative Net Operating Income (NOI)		# of Properties meeting Debt Coverage Ratio (DCR)	# of Properties not meeting DCR	# of Properties DCR Not Applicable
25	784	8	526			
8	437	17	1,914	16	2	6
18	2,054	2	224	13	0	4

Public Housing Demographics

	Households				% Family Type (head of household)				Race % (head of household)					
	# of Households	% of Households	Average Family Size	Average Unit Size	Adults no Children	Family with Children	Elderly	Disabled Not Elderly	Black African American	White	Native American	Asian	Hawaiian/ Pacific Islnd	Hispanic/ Latino
Public Housing Residents														
0 to 10% MFI	282	21.8%	2.5	1.9	10.4%	11.4%	1.1%	5.9%	6.3%	10.0%	1.0%	0.5%	0.6%	3.4%
11 to 20%	578	44.7%	1.6	1.4	35.8%	8.9%	14.8%	22.3%	10.1%	26.1%	1.6%	1.9%	0.6%	4.3%
21 to 30%	234	18.1%	2.1	1.6	12.2%	5.9%	6.7%	5.4%	2.6%	10.6%	0.5%	1.4%	0.3%	2.7%
51 to 80%	46	3.6%	2.6	2.2	1.3%	2.2%	0.5%	1.1%	0.6%	1.4%	0.2%	0.3%	0.0%	1.1%
Over 80%	9	0.7%	2.6	2.1	0.6%	0.1%	0.1%	0.1%	0.2%	0.4%	0.0%	0.0%	0.0%	0.2%
All	1,293	100.0%	2.0	1.6	65.4%	34.6%	26.1%	37.0%	22.8%	53.5%	3.9%	4.5%	1.7%	13.7%

Waiting List

0 to 10% MFI	6,874	40.9%	8.0	1.4		1.8%	13.6%	12.8%	19.6%	2.0%	1.0%	0.6%	3.8%	1.2%
11 to 20%	5,000	29.8%	2.0	1.4		3.7%	14.6%	9.0%	14.8%	1.4%	1.2%	0.4%	2.5%	0.5%
21 to 30%	2,643	15.7%	2.3	1.4		2.3%	4.8%	4.4%	7.9%	0.6%	0.7%	0.2%	1.6%	0.3%
31 to 50%	1,818	10.8%	2.6	1.4		1.2%	2.2%	3.2%	4.9%	0.3%	0.6%	0.2%	1.4%	0.2%
51 to 80%	328	2.0%	2.7	1.3		0.2%	0.3%	0.6%	0.8%	0.1%	0.1%	0.1%	0.2%	0.1%
Over 80%	134	0.8%	2.4	1.5		0.1%	0.2%	0.3%	0.3%	0.0%	0.0%	0.0%	0.1%	0.0%
All	16,797	100.0%	4.6	1.4		9.3%	35.8%	30.3%	48.3%	4.4%	3.6%	1.5%	9.6%	2.3%

* Race and ethnicity are not required fields on the Waitlist Application in Yardi

Other Activity

	#'s, days, hrs
Public Housing	
Names pulled from Wait List	130
Denials	9
New rentals	7
Vacates	10
Evictions	0
# of work orders received	1,610
# of work orders completed	872
Average days to respond	11.2
# of work orders emergency	0
Average response hrs (emergency)	16

Rent Assistance Performance Measures

Utilization and Activity

	Current Month Status						Current Month Activity				Calendar Year To Date				
	Authorized Vouchers	Utilized Vouchers	Utilization	Average Voucher	HUD Subsidy Over(Under)	Remaining Waiting List	Waiting List Names	New Vouchers Leased	Vouchers Terminated	Voucher Inspections Completed	Utilization	Average Voucher	HUD Subsidy Over(Under)	New Vouchers	Vouchers Terminated
Tenant Based Vouchers	6,277	5,614	89%	\$779	-176,192	3,065	0	1	18	365	91%	\$776	-797,491	23	142
Project Based Vouchers	2,141	2,109	99%	\$804	145,479			19	7	103	98%	\$795	815,169	173	125
VASH Vouchers	664	556	84%	\$715	-58,027			7	5	52	88%	\$712	-257,816	38	40
FUP Vouchers	100	97	97%	\$890	4,523			0	1	9	97%	\$915	47,927	2	4
RAD Project Based Vouchers	791	782	99%	\$528	5,288			7	4	44	99%	\$539	243,985	58	48
SRO/MOD Vouchers	512	501	98%	\$436	-42,611			7	7	15	99%	\$447	-241,108	58	65
All Vouchers	10,485	9,659	92%	\$744	-121,540			41	42	588	93%	\$742	-189,334	352	424

Home Forward - Dashboard Report For July of 2018

Demographics

	Households				% Family Type (head of household)				Race % (head of household)					
	# of Households	% of Households	Average Family Size	Average Unit Size	Adults no Children	Family with Children	Elderly	Disabled Not Elderly	Black	White	Native	Asian	Hawaiian/	Hispanic
Tenant Based Voucher Participants														
0 to 10% MFI	1091	17.8%	2.3	2.0	8.5%	9.3%	0.8%	4.6%	7.1%	8.2%	0.7%	0.4%	0.2%	1.2%
11 to 20%	2,532	41.4%	1.9	1.8	30.7%	10.6%	15.0%	17.4%	13.3%	21.2%	1.2%	3.1%	0.2%	2.3%
21 to 30%	1,380	22.5%	2.2	2.0	14.1%	8.4%	8.3%	7.0%	7.6%	12.1%	0.3%	1.1%	0.2%	1.1%
31 to 50%	948	15.5%	2.9	2.3	6.2%	9.3%	2.9%	3.3%	6.8%	6.5%	0.3%	0.7%	0.2%	1.0%
51 to 80%	164	2.7%	3.1	2.6	0.9%	1.8%	0.2%	0.3%	1.4%	1.0%	0.1%	0.1%	0.0%	0.2%
Over 80%	8	0.1%	2.9	2.5	0.1%	0.1%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
All	6,115	100%	2.5	2.2	60%	39%	27%	33%	36%	49%	3%	5%	1%	6%

	Households				% Family Type (head of household)				Race % (head of household)					
	# of Households	% of Households	Average Family Size	Average Unit Size	Adults no Children	Family with Children	Elderly	Disabled Not Elderly	Black	White	Native	Asian	Hawaiian/	Hispanic
Project Based Voucher Participants														
0 to 10% MFI	727	25.3%	1.8	1.5	15.9%	9.3%	1.4%	8.7%	6.4%	14.3%	1.1%	0.6%	0.3%	2.6%
11 to 20%	1,235	42.9%	1.6	1.3	36.0%	6.9%	14.6%	20.3%	10.0%	26.8%	1.4%	1.2%	0.1%	3.4%
21 to 30%	554	19.2%	2.1	1.6	13.7%	5.6%	8.0%	5.2%	4.6%	11.8%	0.3%	0.6%	0.3%	1.7%
31 to 50%	298	10.4%	3.0	2.2	4.6%	5.8%	2.3%	1.6%	2.8%	4.6%	0.4%	0.1%	0.2%	2.2%
51 to 80%	56	1.9%	3.4	2.4	0.5%	1.4%	0.1%	0.1%	0.7%	0.5%	0.1%	0.0%	0.0%	0.7%
Over 80%	8	0.3%	2.8	1.9	0.1%	0.1%	0.0%	0.1%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%
All	2,870	100%	2.4	1.8	71%	29%	26%	36%	24%	58%	3%	2%	1%	11%

	Households				% Family Type (head of household)				Race % (head of household)						Not Reported
	# of Households	% of Households	Average Family Size	Average Unit Size	Adults no Children	Family with Children	Elderly	Disabled Not Elderly	Black	White	Native	Asian	Hawaiian/	Hispanic	
Waiting List															
0 to 10% MFI	1	100.0%	2.0					0.0%	0.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%
11 to 20%	140	26.4%	2.5					1.9%	8.1%	8.8%	12.2%	1.2%	0.8%	0.2%	0.8%
21 to 30%	70	13.2%	2.6					2.4%	2.8%	3.5%	7.1%	0.2%	0.6%	0.0%	0.6%
31 to 50%	55	10.4%	2.7					0.9%	1.5%	3.5%	4.7%	0.3%	0.5%	0.6%	0.0%
51 to 80%	13	2.4%	3.0					0.2%	0.2%	1.2%	0.9%	0.0%	0.0%	0.0%	0.3%
Over 80%	8	1.5%	2.4					0.2%	0.4%	0.2%	0.9%	0.0%	0.2%	0.0%	0.2%
All	287	153.9%	2.6					5.6%	13.0%	117.1%	25.9%	1.7%	2.1%	0.8%	1.3%

Short Term Rent Assistance

	# of Households Participating	\$ Amount of Assistance Provided	Average Cost per Household
Shelter Plus Care	453	\$358,377	791
Short Term Rent Assistance	111	\$104,030	937

Resident Services

Resident Programs

	Housing Program Served	Households Served/ Participants	Monthly Funding Amount	Average Funds per Participant										
Congregate Housing Services * as of previous month	Public Housing	139	\$84,160	\$605.47										
Resident Services Coordination	Public Housing				# HH Eviction Prevention	Health and Safety Stabilized appointments assisting residents to connect and utilize community	Unduplicated Number Served	# Events	# Event Attendees					
					312	1115	5665	167						
		# of Participants	Escrow \$ Held	New Enrollees	# of Graduates	Escrow \$ Disbursed	Terminations or Exits	Escrow \$ Forfeited	Avg Annual Earned Income Increase Over Last Year	Escrow \$ Forfeited	Avg Annual Earned Income Increase Over Last Year			
Nine months ending 12/31/2017	Public Housing	158	\$327,168	1	3	\$6,866	4	\$0	\$1,191					
Twelve months ending 3/31/2018	Section 8	50	\$180,300	0	0	\$14,889	0	\$0	\$298					

Agency Financial Summary

Six months ending 3/31/18	Fiscal Year to Date	Prior YTD	Increase (Decrease)
Subsidy Revenue	\$106,277,781	\$97,438,370	\$8,839,411
Grant Revenue	\$18,589,787	\$15,123,946	\$3,465,841
Property Related Income	\$20,642,578	\$19,292,343	\$1,350,235
Development Fee Revenue	\$2,917,611	\$4,192,828	(\$1,275,216)
Other Revenue	\$9,458,690	\$8,292,279	\$1,166,411
Total Revenue	\$21,370,858	\$21,267,348	\$103,510
Housing Assistance Payments	\$100,122,503	\$85,729,040	\$14,393,463
Operating Expense	\$48,546,478	\$48,298,639	\$247,839
Depreciation	\$8,484,015	\$7,814,319	\$669,696
Total Operating Expenses	\$157,152,996	\$141,841,997	\$15,310,999
Operating Income	\$44,399,367	\$46,326,653	-\$1,927,286
Other Income(Expense)	-\$94,799	\$2,562,218	(\$2,657,017)
Capital Contributions	\$10,738,589	\$2,459,698	\$8,278,892
Increase(Decrease) Net Assets	\$13,491,091	\$12,255,387	\$1,235,704
Total Assets	\$467,629,631	\$448,147,292	\$19,482,339
Liquidity Reserves	\$33,152,640	\$20,407,791	\$12,744,849

Development/Community Revitalization**New Development / Revitalization**

	Units	Construction Start	Construction End	Current Phase	Total Cost	Cost Per Unit
Square Manor	48	Mar-17	Jan-18	Post Construction	\$11,191,518	\$233,157
Gladstone Square	N/A	Feb-18	Jul-18	Construction	\$288,000	N/A
Rockwood Landing Roof Replacement	21	Nov-17	Jun-18	Capital Improvement	\$600,000	\$28,571
Richmond Place Rehab	54	Aug-17	Jan-18	Capital Improvement	\$8,949,559	\$168,860
Multnomah Manor	240	Dec-17	Oct-20	Pre-Construction	\$76,923,525	\$320,515
NE Grand						

Capital Improvement

Fairview Woods Recladding	N/A	Jun-17	Jul-18	Construction	\$3,900,000	N/A
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