

## **PUBLIC NOTICE:**



Home Forward  
BOARD OF COMMISSIONERS  
will meet on  
Tuesday, May 19, 2020  
At 6:15 pm  
Via Zoom  
Call in: 1.253.215.8782  
Meeting ID: 9606354686



MEMORANDUM

To: Community Partners

Date: May 12, 2020

From: Michael Buonocore, Executive  
Director

Subject: Home Forward Board of  
Commissioners May  
Meeting

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The Board of Commissioners of Home Forward will meet on Tuesday, May 19, 2020 via a conference call.

Dial in number: 1.253.215.8782

Meeting ID: 9606354686#

The commission meeting is open to the public.

# AGENDA



## BOARD OF COMMISSIONERS MEETING

HOME FORWARD  
135 SW ASH STREET  
PORTLAND, OREGON

VIA ZOOM  
DIAL-IN NUMBER: 1.253.215.8782  
CONFERENCE ID: 9606354686#

MAY 19, 2020 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 March 17, 2020 Board of Commissioners Conference Call Meeting Minutes of April 8, 2020 Board of Commissioners Conference Call Meeting

### CONSENT CALENDAR

Following Reports and Resolutions:			
20-05	Topic	Presenter/POC	Phone #
01	Renewal of Employee Health and Welfare Benefit Plans for the Plan Year July 1, 2020 to June 30, 2021	Aimee Smith Donna Jensen	503.802.8529 503.802.8470



## REPORTS/RESOLUTIONS

Following Reports and Resolutions:			
20-05	Topic	Presenter/POC	Phone #
<b>REPORT</b>	<b>Annual Procurement and Equity Report</b>	Celeste King Peter Garcia	503.802.8541 503.802.8549
<b>02</b>	<b>Authorize Execution of Contract for Construction Manager/General Contractor Services for Baldwin Permanent Supportive Housing</b>	Amanda Saul	503.802.8529
<b>03</b>	<b>Authorize Execution of Contract for Professional Architecture and Engineering Services for Baldwin Permanent Supportive Housing</b>	Amanda Saul	503.802.8529
<b>04</b>	<b>Authorizes Changes to the Administrative Plan for Rent Assistance</b>	Dena Ford-Avery Ian Slingerland	503.802.8568 503.802.8370

## THE NEXT MEETING OF THE BOARD OF COMMISSIONERS

Home Forward is currently operating in a state of emergency. We will continue to conduct board-related business as it is currently scheduled, but will update the public on the venue or forum by which it occurs as we assess the situation.

The following are the dates and times for the upcoming board meetings:

The next Board Work Session will be on Wednesday, June 3, 2020 at 5:30 PM. The next Board of Commissioners meeting will be Tuesday, June 16, 2020 at 6:15 PM.

## 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 MEETING  
HOME FORWARD  
CONFERENCE CALL  
135 SW Ash Street Portland, OR 97204  
March 17, 2020**

**COMMISSIONERS PRESENT**

Chair Damien Hall, Vice Chair Matthew Gebhardt, Treasurer Jenny Kim, Chair Emeritus Miki Herman, Commissioners Richard Anderson, TomiRene Hettman

**STAFF PRESENT**

Peter Beyer, Michael Buonocore, Dena Ford-Avery, Carolina Gomez, Kitty Miller, Amanda Saul, Taylor Smiley Wolfe, Celia Strauss

Chair Damien Hall convened the meeting at 6:20 PM.

**MEETING MINUTES**

**Minutes of the February 18, 2020 Board of Commissioners Meeting**

Chair Damien Hall requested a motion authorizing approval of the minutes to the February 18, 2020 Board of Commissioners Meeting. Commissioner Richard Anderson moved to adopt the minutes and Chair Emeritus Miki Herman seconded the motion.

**The vote was as follows:**

**Chair Damien Hall—Aye  
Vice Chair Matthew Gebhardt—Aye  
Treasurer Jenny Kim—Aye  
Chair Emeritus Miki Herman—Aye  
Commissioner Richard Anderson —Aye  
Commissioner TomiRene Hettman—Aye**

**CONSENT CALENDAR**

**RESOLUTION 20-03-01 Authorize Submission of Home Forward's Twentieth Year Moving to Work Report**

**RESOLUTION 20-03-02 Authorize Submission of Seventh Amendment to Moving to Work Agreement**

**RESOLUTION 20-03-03 Authorize Renewal of Cecelia and Trouton Partnerships Letters of Credit**

**RESOLUTION 20-03-04 Authorize Submission of Low Income Housing Tax Credits and Funding Applications for Fairfield Apartments Preservation**

**RESOLUTION 20-03-05 Authorize Execution of Site Control Documentation for the Fairfield Apartments**

There being no questions, Chair Damien Hall requested a motion to approve. Vice Chair Matthew Gebhardt moved to adopt the Consent Calendar, Treasurer Jenny Kim seconded the motion.

**The vote was as follows:**

**Chair Damien Hall—Aye**  
**Vice Chair Matthew Gebhardt—Aye**  
**Treasurer Jenny Kim—Aye**  
**Chair Emeritus Miki Herman—Aye**  
**Commissioner Richard Anderson —Aye**  
**Commissioner TomiRene Hettman—Aye**

**ADJOURN**

There being no further business, Chair Damien Hall adjourned the conference call meeting at 6:24 PM.

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

**ADOPTED: MAY 19, 2020**

**Attest:**

**Home Forward:**

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Michael Buonocore, Secretary

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Damien R. Hall, Chair



**BOARD OF COMMISSIONERS WORK SESSION  
HOME FORWARD  
CONFERENCE CALL  
135 SW Ash Street Portland, OR 97204  
April 8, 2020**

**COMMISSIONERS PRESENT**

Chair Damien Hall, Vice Chair Matthew Gebhardt, Treasurer Jenny Kim, Chair Emeritus Miki Herman, Commissioners Richard Anderson, TomiRene Hettman and David Widmark

**STAFF PRESENT**

Elise Anderson, April Berg, Peter Beyer, Michael Buonocore, Ian Davie, Tonya Evans, Dena Ford-Avery, Monica Foucher, Carolina Gomez, Biljana Jesic, Kitty Miller, Kandy Sage, Amanda Saul, Shannon Schmidt, Ian Slingerland, Taylor Smiley Wolfe, Celia Strauss

Executive Director Michael Buonocore opened the work session saying that in April we only had one item on the Board agenda. We are asking the Board to consider Resolution 20-04-01. He turned the meeting over to Chair Damien Hall who convened the public portion of the meeting at 5:40 PM. In introducing Resolution 20-04-01 to Authorize the Refinance of Existing HUD-Insured Loans on Rockwood Station and Fairview Oaks-Woods, Chair Hall noted that the READ Committee had received the background information. Asset Management Director Tonya Evans, presented the resolution saying the purpose of this refinancing proposal is to take advantage of interest rate savings available in the market today and to improve the cash flow for the properties. She went on to explain the process. Commissioner Anderson asked if there was sufficient occupancy to close the loans and Evans said yes.

There being no further questions, Chair Damien Hall requested a motion to approve. Treasurer Jenny Kim moved to adopt Resolution 20-04-01 and Commissioner Richard Anderson seconded the motion.

**The vote was as follows:**

**Chair Damien Hall—Aye**  
**Vice Chair Matthew Gebhardt—Aye**  
**Treasurer Jenny Kim—Aye**  
**Chair Emeritus Miki Herman—Aye**  
**Commissioner Richard Anderson —Aye**  
**Commissioner TomiRene Hettman—Aye**  
**Commissioner David Widmark—Aye**

**ADJOURN**

There being no further business, Chair Damien Hall adjourned the public portion of the work session at 5:43 PM.

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

**ADOPTED: MAY 19, 2020**

**Attest:**

**Home Forward:**

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Michael Buonocore, Secretary

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Damien R. Hall, Chair

# CONSENT CALENDAR



## MEMORANDUM

To:	Board of Commissioners	Date:	May 19, 2020
From:	Aimee Smith, Director of Human Resources 503.802.8529  Donna Jensen, Benefits & Payroll Specialist 503.802.8470	Subject:	Authorize the Renewal of Employee Health and Welfare Benefit Plans for the Plan Year July 1, 2020 to June 30, 2021 Resolution 20-05-01

The Board of Commissioners is requested to approve the recommendation of Home Forward's Labor Management Healthcare Plan Committee to renew the health and welfare benefits plans for the July 1, 2019 to June 30, 2020 plan year.

Home Forward offers health and welfare benefits to eligible employees. Annually, decisions are made about the plan design of the benefits program, and through Home Forward's benefits broker, contracts are negotiated with benefits providers. Once the contracts are negotiated and approved, Home Forward employees participate in open enrollment.

Under state law, benefits are a mandatory subject of bargaining. Home Forward's Labor Management Healthcare Plan Committee, established in 2003, is the forum through which Home Forward bargains the health and welfare plan changes required by the escalating costs of medical and dental insurance benefits. The nine members of the Committee include three representatives each from AFSCME, the Building Trades and Management. The agency's benefits broker, The Partners Group, collaborates with the Committee. The Partners Group provides benefit analysis, healthcare plan utilization, information on health insurance trends and any other information deemed necessary for the Committee to make informed decisions about Home Forward's healthcare plans and



cost containment strategies. Recommendations for health plan renewals are made to the Board of Commissioners based on a majority vote of the Committee members.

Our standard approach is to navigate to a benefit renewal of no more than a 5% increase over the prior year. A 5% increase was included in the budget for FY2020. Other guiding principles for the Labor Management Healthcare Committee include trying to maintain benefits, when possible, year-to-year, maintaining parity between the health insurance plans and ensuring that any necessary changes to the plans impact the fewest number of employees possible. Additionally, this year we made this a more interactive process which resulted in expanding the options for our employees to be able to receive more inclusive services.

Home Forward's medical insurance, which accounts for the majority of Home Forward's health and welfare costs, is split between two carriers, Kaiser and Providence. Dental insurance coverage is provided by Kaiser and MetLife. In past years, there was a need for The Partners Group to negotiate with the carriers following initial renewal information to look for any flexibility in the proposed increases that exceeded the target of 5% (or \$16,068 per employee annually). For this renewal, the initial renewal offers to keep the current health and welfare plans were favorable. Our members wanted to explore more options and consider ways to make our services more inclusive and robust.

As a committee, we opted to accept the offers of: Kaiser medical at 3%, and Kaiser and MetLife dental at 0%. Home Forward's short-term, long-term and life insurance policies did not experience an increase.

For the Providence Health Plan the committee determined that they wanted to grow the provider network by going from an EPO to a PPO model that allows for more inclusive services. This determination resulted in a 5% increase for Providence.

When considering the budget from a per-employee-per-year cost versus a flat percentage, we had the opportunity to maximize our budget dollars to offer additional Home Forward provided accident and critical illness insurance. We also will be providing voluntary pet insurance to our staff.

The carrier for Home Forward's medical flexible spending account, dependent care account and commuter expense account continues to be ASIFlex. Feedback on customer support from this carrier has been mostly positive.

In total, this plan year will have an estimated 5.8% increase in annual cost while maintaining an estimated savings of \$449.00 under the annual budget per employee. This savings will allow for absorption in the fluctuation of employee enrollment changes, or to support other budgetary expenditures for the fiscal year.

On April 15, 2020 the Labor Management Healthcare Committee voted unanimously to recommend to the Board of Commissioners renewing the proposed health and welfare benefits package.

#### ATTACHMENT

Summary of the impact to Home Forward of the health and welfare benefit renewal



## **RESOLUTION 20-05-01**

### **RESOLUTION 20-05-01 AUTHORIZES THE RENEWAL OF EMPLOYEE HEALTH AND WELFARE BENEFIT PLANS FOR THE PLAN YEAR JULY 1, 2020 TO JUNE 30, 2021**

**WHEREAS**, the representatives of Home Forward, AFSCME and the Building Trades Council have formed a joint Labor Management Healthcare Plan Committee for the purpose of evaluating, designing and recommending healthcare plans; and

**WHEREAS**, the provision of health and welfare benefits is a mandatory subject of bargaining under the Public Employer Collective Bargaining Act; and

**WHEREAS**, the duly authorized representatives of Home Forward have met in negotiation meetings with representatives of AFSCME and the Building Trades Council; and

**WHEREAS**, the Committee has voted to recommend to the Executive Director and the Board of Commissioners that the healthcare plans be renewed;

**NOW, THEREFORE, BE IT RESOLVED**, by the Board of Commissioners of Home Forward to approve the recommendation of the Labor Management Healthcare Plan Committee to adopt the health and welfare benefit plan cost changes as described in Attachment A.

**ADOPTED: MAY 19, 2020**

**Attest:**

**Home Forward:**

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Michael Buonocore, Executive Director

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Damien Hall, Board Chair

**Home Forward - Renewal 7/1/2020**  
**Estimated Annual Employer Impact/Cost Projection**  
**(Providence Extend PPO Network Plan Replaces EPO, Add Hartford Accident and Critical Illness Plans)**  
**All Bargaining Groups**

**Current vs Proposed**

Benefit Plan	Current Rates and Fees			Estimated Renewal Costs - Current Rates v. Proposed Rates					
				Rates & Fees		Dollar Change		Percent of Change	
	Total Annual Cost	EE Count	Annual Cost/EE	Total Annual Cost	Annual Cost/EE	Total Annual Cost	Annual Cost/EE	Total Annual Cost	Annual Cost/EE
Providence Health Plans	\$1,918,960	103	\$18,631	\$2,014,898	\$19,562	\$95,938	\$931	5.0%	5.0%
Kaiser - HMO Plan	\$1,984,280	159	\$12,480	\$2,044,681	\$12,860	\$60,401	\$380	3.0%	3.0%
<b>Medical/Rx/Vision Plan(s) Subtotal</b>	<b>\$3,903,240</b>	<b>262</b>	<b>\$14,898</b>	<b>\$4,059,579</b>	<b>\$15,495</b>	<b>\$156,338</b>	<b>\$597</b>	<b>4.0%</b>	<b>4.0%</b>
MetLife Dental	\$125,805	82	\$1,534	\$125,805	\$1,534	\$0	\$0	0.0%	0.0%
Kaiser DMO Dental	\$344,217	183	\$1,881	\$344,217	\$1,881	\$0	\$0	0.0%	0.0%
<b>Dental Plan(s) Subtotal</b>	<b>\$470,022</b>	<b>265</b>	<b>\$1,774</b>	<b>\$470,022</b>	<b>\$1,774</b>	<b>\$0</b>	<b>\$0</b>	<b>0.0%</b>	<b>0.0%</b>
<b>Subtotal: Combined Health Plans</b>	<b>\$4,373,262</b>	<b>262</b>	<b>\$16,692</b>	<b>\$4,529,600</b>	<b>\$17,289</b>	<b>\$156,338</b>	<b>\$597</b>	<b>3.6%</b>	<b>3.6%</b>
Estimated AFSCME EE Contributions	\$335,023	150	\$2,233	\$346,353	\$2,309	\$11,331	\$76	3.4%	3.4%
Estimated Trades EE Contributions	\$107,465	52	\$2,067	\$107,684	\$2,071	\$219	\$4	0.2%	0.2%
Estimated Non-Represented EE Contributions	\$208,846	60	\$3,481	\$216,904	\$3,615	\$8,058	\$134	3.9%	3.9%
Estimated Employee Contributions	\$651,334	262	\$2,486	\$670,941	\$2,561	\$19,607	\$75	3.0%	3.0%
<b>Subtotal: Net Employer Health Plan Cost</b>	<b>\$3,721,928</b>	<b>262</b>	<b>\$14,206</b>	<b>\$3,858,659</b>	<b>\$14,728</b>	<b>\$136,731</b>	<b>\$522</b>	<b>3.7%</b>	<b>3.7%</b>
Hartford Life/AD&D	\$40,651	276	\$147	\$40,651	\$147	\$0	\$0	0.0%	0.0%
Hartford STD	\$65,416	267	\$245	\$65,416	\$245	\$0	\$0	0.0%	0.0%
Hartford LTD	\$27,383	270	\$101	\$27,383	\$101	\$0	\$0	0.0%	0.0%
Hartford Accident	\$0	0	\$0	\$35,500	\$129	\$35,500	\$129	N/A	N/A
Hartford Critical Illness	\$0	0	\$0	\$51,468	\$186	\$51,468	\$186	N/A	N/A
<b>Life, AD&amp;D &amp; Disability Plans Subtotal</b>	<b>\$133,451</b>	<b>276</b>	<b>\$484</b>	<b>\$220,419</b>	<b>\$799</b>	<b>\$86,968</b>	<b>\$315</b>	<b>65.2%</b>	<b>65.2%</b>
<b>Subtotal: Net Health, Life/Disability Plan</b>	<b>\$3,855,379</b>	<b>262</b>	<b>\$14,715</b>	<b>\$4,079,078</b>	<b>\$15,569</b>	<b>\$223,699</b>	<b>\$854</b>	<b>5.8%</b>	<b>5.8%</b>
ASI Flex 125 Plan Admin Services	\$5,796	138	\$42	\$5,796	\$42	\$0	\$0	0.0%	0.0%
ASI Flex 132 (CERA) Plan Admin Services	\$1,428	34	\$42	\$1,428	\$42	\$0	\$0	0.0%	0.0%
Cigna Business Travel Accident	\$2,144	276	\$8	\$2,144	\$8	\$0	\$0	0.0%	0.0%
ComPsych EAP	\$3,709	276	\$13	\$3,709	\$13	\$0	\$0	0.0%	0.0%
<b>Ancillary Plans' Subtotal</b>	<b>\$13,077</b>	<b>276</b>	<b>\$47</b>	<b>\$13,077</b>	<b>\$47</b>	<b>\$0</b>	<b>\$0</b>	<b>0.0%</b>	<b>0.0%</b>
<b>NET GRAND TOTAL: ALL PLANS</b>	<b>\$3,868,457</b>	<b>262</b>	<b>\$14,765</b>	<b>\$4,092,155</b>	<b>\$15,619</b>	<b>\$223,699</b>	<b>\$854</b>	<b>5.8%</b>	<b>5.8%</b>

Cigna Business Travel Accident: Home Forward paid 3 years in full during July 2018 renewal. The amount shown is the annual cost of the 3 years paid in full.

**2020 Benefits Budget**

Number of Employees	Annual Budget Per Employee	Annual Employer Cost	Projected Budget*	Annual Employer Cost	Budget Surplus**
262	\$16,068	\$4,209,816	\$15,619	\$4,092,178	\$117,638

\*Based on the Employer Budget Impact Report and includes the Providence Extend PPO Network, the new Hartford Accident and Critical Illness plans and carrier renewals.

\*\*Budget Surplus is calculated as follows: \$4,209,816 - \$4,092,178 = \$117,638

It is important to note that any shift in enrollment could change the projected \$15,619 thus the need for a budget surplus.

# **ANNUAL PROCUREMENT AND EQUITY REPORT**



## MEMORANDUM

To: Board of Commissioners

Date: May 19, 2020

From: Celeste King, Procurement and  
Contract Manager  
503.802.8541

Subject: Annual Procurement and  
Equity Report – FY 2019

Peter Garcia  
Senior Procurement Coordinator  
503.802.8549

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### Contracting Overview

The Procurement and Contracts Department strives to meet Home Forward's wide-ranging contracting needs while ensuring compliance with the law and compliance with agency goals around equity and supporting local target businesses and diversifying the construction workforce. This annual report reviews the outcomes of these efforts in Fiscal Year (FY) 2019 by providing an overview of Home Forward's procurement activity, and how this activity relates to meeting agency goals for contracting, 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.

#### *FY2019 Activity*

In FY 2019, the Procurement department processed 518 new contracts and amendments to existing contracts in the twelve month fiscal year period. This is an approximate 22% increase of total contracts from the year prior. Figure 1 below depicts the contracting activity levels within each procurement category, as well as the total dollar values.

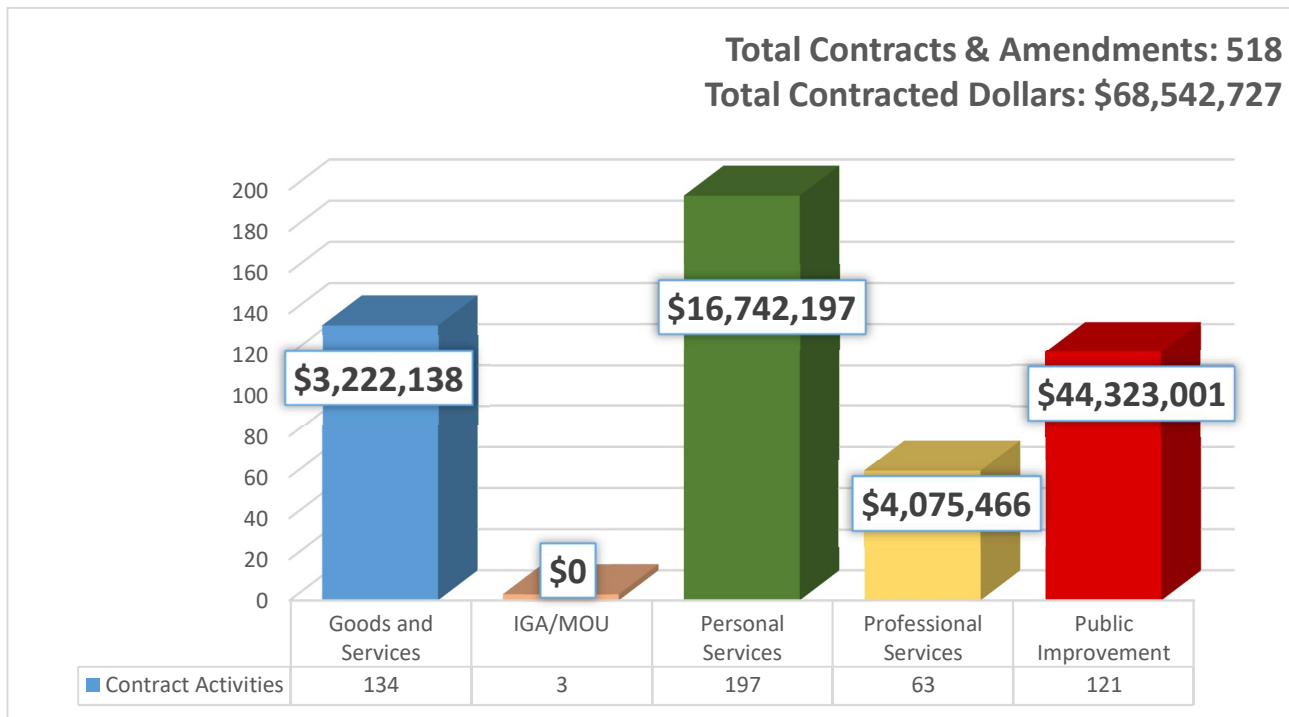


Figure 1. FY 2019 Contract and Amendment Activity. The Personal Services category includes the costs of third party property management activities, but not contract activities.

## 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.<sup>1</sup> 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 contracting and hiring requirements related to Section 3 of the HUD Act of 1968. Section 3 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 government assistance for housing, and to business concerns which provide economic opportunities to low- and very low-income persons."<sup>2</sup>

<sup>1</sup> 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.

<sup>2</sup> 24 C.F.R. § 135.1.a (2017).

In 2019, the Procurement Department proposed a change to the Economic Equity Policy that expanded the scope of target business engagement to align with that of other public agencies and Oregon’s Certification Office for Business Inclusion and Diversity (COBID). In addition to Minority Business Enterprises (MBE), Women Business Enterprises (WBE), and Emerging Small Businesses in Home Forward’s equity contracting efforts, businesses that are certified as Disadvantaged Business Enterprises (DBE) or Service Disabled Veteran (SDV) owned are now also part of Home Forward’s Economic Equity Policy.

Since 2017, the Procurement Department has presented this annual report on its economic equity contracting outcomes in a manner that reflects the prevailing practices of other public agencies. As such, classes of contracts are excluded from the contracting data that determines the participation percentages among COBID-certified firms. Both intergovernmental agreements/memorandums of understanding (IGA/MOU) and contracts with non-profit agencies are excluded, as these entities are legally unable to become certified in Oregon’s COBID program. Of the 518 contract and amendment activities in FY 2019 reported above, 484 of them have been considered when calculating the outcomes below.

### COBID Participation Outcomes

In FY 2019, 28% of Home Forward’s contracting dollars were directed to COBID-certified firms, exceeding the 20% aspirational goal established in the Economic Equity Policy. Figure 2 below shows a detail of the COBID participation for FY 2019, with attention given to the procurement process by which the contracts were established, indicating the COBID engagement across general range of contract values as well as the competitive nature of the selection processes. The table following (Figure 3) provides a disaggregated look at the COBID contracting data to show the percentages of contract dollars awarded by certification type.



ECONOMIC EQUITY CONTRACTING OUTCOMES – FISCAL YEAR 2019				
Personal Services and Goods & Services	Number of Contracts & Amendments	Total Contract Amount	Total Amount of COBID Contracting Dollars	Percent COBID Utilization
Direct Appointment	156	\$ 8,863,316	\$ 326,851	03.6%
Intermediate	115	\$ 2,170,143	\$ 555,207	25.5%
Formal	29	\$ 6,822,985	\$ 2,153,694	31.5%
Subtotal	300	\$ 17,856,444	\$ 3,035,752	17.0%
Professional Services	Number of Contracts & Amendments	Total Contract Amount	Total Amount of COBID Contracting Dollars	Percent COBID Utilization
Direct Appointment	25	\$ 315,100	\$ 38,000	12.0%
Intermediate	8	\$ 332,715	\$ 100,300	30.1%
Formal	30	\$ 3,517,576	\$ 835,192	23.7%
Subtotal	63	\$ 4,165,391	\$ 973,493	23.3%
Public Improvement	Number of Contracts & Amendments	Total Contract Amount	Total Amount of COBID Contracting Dollars	Percent COBID Utilization
Direct Appointment	8	\$ 43,739	\$ 8,874	20.2%
Intermediate	24	\$ 535,804	\$ 232,551	43.4%
Formal	89	\$ 43,743,458	\$ 14,328,899	32.7%
Subtotal	121	\$ 44,323,001	\$ 14,570,324	32.8%
<b>Total</b>	<b>484</b>	<b>\$ 66,344,836</b>	<b>\$ 18,579,569</b>	<b>28%</b>

Figure 2. FY 2019 Economic Equity Contracting Results

The overall 28% COBID engagement for FY 2019 represents a 2% increase from the outcomes during the truncated Stump Year 2018, and a 4% increase from the last full contracting year reported in FY 2018. After contracts with non-profits and government entities have been excluded, the present fiscal year shows a 59% increase in contract spending compared to contract spending in SY 2018, as well as a 70% increase in contract spending with COBID firms compared to SY 2018.

#### *Disaggregated COBID Data*

Although Home Forward expanded its contracting equity program to include additional certification types, the MBE, WBE, and ESB certifications were the only designations engaged in this reporting year. Vendors that have more than one certification are counted only once, and priority of certification acknowledgement follows the hierarchy of minority-owned, woman-owned, then emerging small business. Hence, if a vendor has both MBE and ESB certifications, the contracting dollars awarded to that business will only be recorded for engagement with a minority-owned business.

Procurement Category	Contracted Amount	COBID Contract Amount	MBE %	WBE %	ESB %
Personal Services & Goods and Services	\$17,856,444	\$3,035,752	18%	76%	6%
Professional Services	\$4,165,391	\$973,493	41%	56%	4%
Public Improvement	\$44,323,001	\$14,570,324	49%	42%	9%
<b>Total</b>	<b>\$66,344,836</b>	<b>\$18,579,569</b>	<b>44%</b>	<b>48%</b>	<b>8%</b>

Figure 3. Disaggregated COBID Engagement by Contract Type

### *Year-Over-Year Review*

Reviewing contracting equity data from the previous three years shows that no two contracting years are exactly alike. This data consistently shows that the high dollar amounts of construction contracts—and the high level of COBID engagement that comes along with these contracts—is the strongest driver of the agency’s total engagement outcomes in a given year.

Procurement Category	FY17*	FY18	SY18	FY19	4-Year Average
Goods & Services, Personal Services, Professional Services COBID Engagement	15%	9%	10%	26%	15%
Public Improvement COBID Engagement	59%	26%	32%	33%	37.5%
<b>Total COBID Business Engagement</b>	<b>37%</b>	<b>24%</b>	<b>26%</b>	<b>28%</b>	<b>28.75%</b>

Figure 4. 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

\* FY17 was the last year in which the old reporting methodology was practiced, which resulted in the exclusion of many contracts, as well as the exclusion of property management costs.

- 3% of HUD-funded non-construction spending is directed toward Section 3 businesses
- 30% of new hires are Section 3 residents<sup>3</sup>

### *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 January 2019 through December 2019, contracts worth approximately \$32,176,000 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.

Home Forward did not meet the 10% target on construction contracting dollars to Section 3 businesses, nor did Home Forward meet the 3% target for non-construction contract activities in this reporting period. The non-construction contracts were primarily legal and relocation contracts, two fields in which there are no Section 3 vendors available. Neither did Home Forward meet the 30% target for hiring Section 3 persons. The household and income information that is used to identify Section 3 persons in the hiring process is disclosed at the discretion of the employee, and therefore, not required information upon hiring. It is possible that more of Home Forward's 45 new hires in 2019 qualify as Section 3 individuals, but such information is not disclosed. The remaining new hires were the result of work at the Schunk Tower RAD renovation and the Medallion/Williams RAD renovation. One of those 15 new employees, hired to work on the Schunk Tower project, qualified as a Section 3 hire.

The following table details the Section 3 activity throughout FY 2019.

<b><u>Section 3 Covered Activity</u> <u>Jan 1, 2019 – Dec 31, 2019</u></b>	<b>Moving To Work</b>	
	<b><i>Construction</i></b>	<b><i>Non-Construction</i></b>
<b>Total Dollar Amount of Construction Contracts Awarded</b>	<b>\$27,609,100.91</b>	<b>\$4,566,860.70</b>
<b>Total Dollar Amounts Awarded to Section 3 Businesses</b>	<b>\$0</b>	<b>\$0</b>
<b>% of the Dollars awarded to Section 3 Businesses</b>	<b>0%</b>	<b>0%</b>
<b>New Hires</b>	<b>60</b>	
<b>Section 3 New Hires</b>	<b>11</b>	
<b>% of Section 3 New Hires</b>	<b>18.33%</b>	

Figure 5. Section 3 outcomes during the period of 1/1/19 through 12/31/19

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

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.”<sup>4</sup>

In FY 2019, Home Forward subcontracted more than \$3.3 million among four contracts with three of the six Section 3-certified firms in the Portland area on projects not covered by HUD funding. In an effort to increase the Section 3 participation on upcoming construction projects, Home Forward staff has been developing strategies to increase resident engagement with economic opportunities. These strategies include connecting with residents, neighborhood coalitions, contractors, pre-apprenticeship programs and Portland Youth Builders ahead of the upcoming planned projects at Dekum Court and 42<sup>nd</sup> & Killingsworth. These two projects are planned to start construction within the next two years. Additionally, the efforts of Home Forward’s Greater Opportunities to Advance, Learn and Succeed (GOALS) program fulfills HUD’s requirements to provide 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 performed by contractors per trade on qualifying construction contracts over \$200,000 and subcontracts of no less than \$100,000. In addition to apprentice hours, the program aims to increase the numbers of women and minorities in the construction trades with aspirational goals of women performing 9% of the labor hours and people of color performing 18% of the labor hours. To meet the goals and program requirements, Home Forward contracts with the City of Portland to monitor job hours and provide reporting. In FY 2019, the City of Portland monitored 364,016 labor hours across nine qualifying construction projects on behalf of Home Forward. Labor hours are reported by trade for each contractor along with data showing (1) hours worked by journey-level workers and apprentices, (2) hours worked by minority and female tradespeople.

The nine qualifying construction projects—Grand Avenue, Medallion & Williams, Repainting at New Columbia, Reroofing at NW Tower Annex, Red Group 1, Schunk Tower (Development),

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<sup>4</sup> 24 C.F.R. § 135.40.b (2017).

Schrunk Tower (Non-Routine Maintenance), Teal Group 1 and Teal Group 2—either began or completed work over the course of FY 2019. Figure 6 below shows the *overall* project compliance on these projects.

Construction Projects Performed in 2019	Reported Hours	Apprentice Hours %	Minority Hours %	Female Hours %
Grand Ave*	263,634	25%	37%	8%
Medallion/ Williams*	52,436	20%	35%	5%
Repainting at New Columbia	5,933	0%	75%	6%
Reroof at NW Tower Annex	1,136	0%	34%	<1%
Red Group 1	5,568	17%	71%	<1%
Red Group 2	2,231	21%	71%	0%
Schrunk Tower (Development)	20,314	13%	67%	6%
Schrunk Tower (Maintenance)	27,059	19%	40%	<1%
Teal Group 1*	89,136	26%	56%	9%
Teal Group 2*	11,665	17%	72%	<1%

Figure 6. Summary of labor hours performed on qualifying Workforce projects.

\*Projects with labor hours in prior year

While some of the projects listed have achieved the 20% apprentice labor hours, these numbers here represent the cumulative hours on the project among all subcontractors and all trades. Many subcontractors succeed on achieving the 20% goal in one trade, but fall short in another performed trade. Subcontractors who fail to meet the requirements are asked to demonstrate their good faith efforts toward achieving compliance. Contractors who fail to do so may be assessed damages. In 2019, one contractor was assessed damages for non-compliance with Workforce requirements.

### Construction Workforce Details

Among these 9 projects, 1723 unique tradespeople performed construction labor. Of that total, 326 registered apprentices performed 23% of the labor hours reported in 2019. The following chart shows how those 1723 tradespeople are spread across by trade and class.

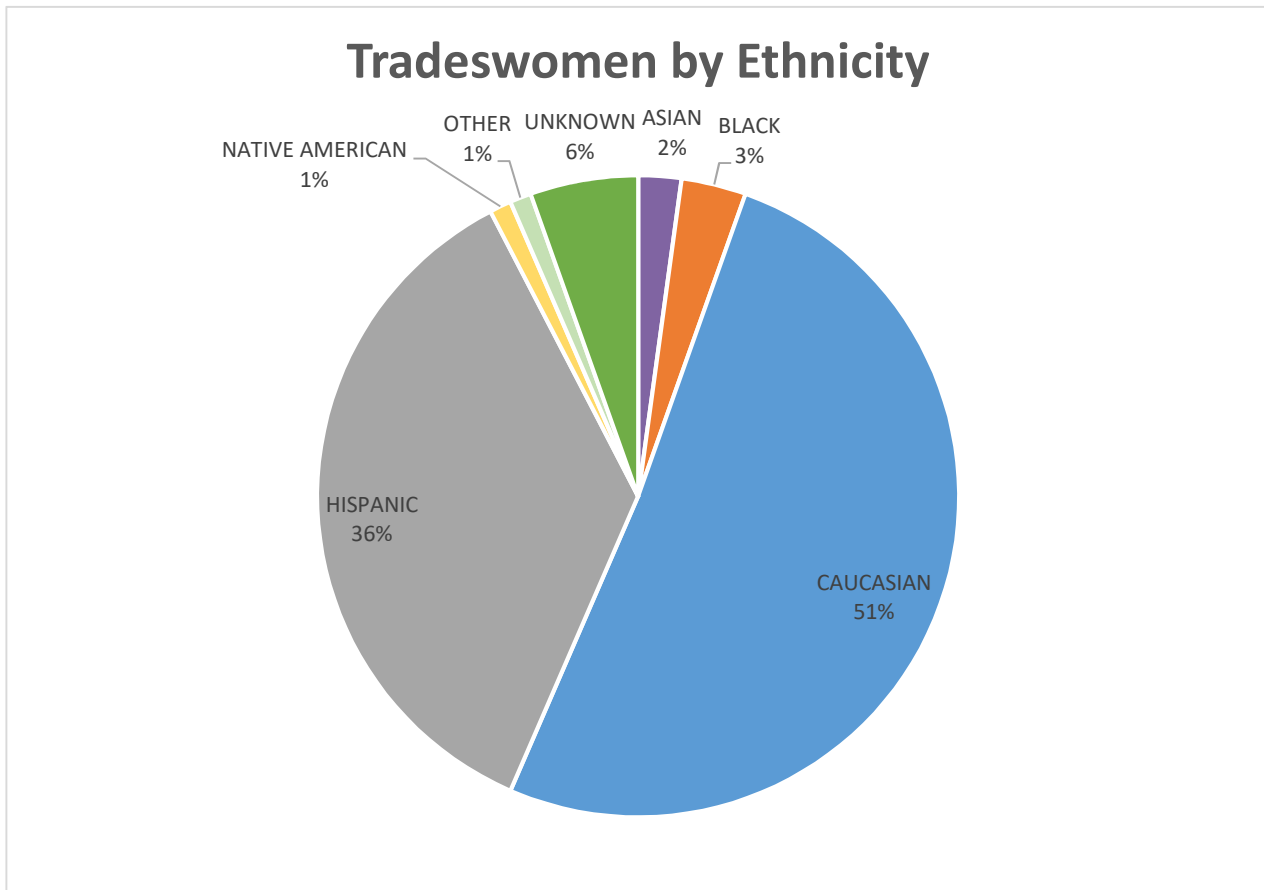


While it is not common for projects to achieve total compliance (each trade under each subcontractor meeting 20% apprenticeship hours goal), the Workforce requirements do increase participation among apprentices, women and people of color on Home Forward construction projects. According to the U.S. Bureau of Labor Statistics, women make up approximately 10% of the construction labor workforce nationally.<sup>5</sup> An analysis and report of the non-residential construction labor workforce in the Portland area published by Metro in 2018 showed that women comprised 4% of the construction workforce, and people of color comprised 20% percent, with the greatest representation among Hispanic workers.<sup>6</sup>

<sup>5</sup> "Women in the labor force: a databook," *BLS Reports*, U.S. Bureau of Labor Statistics, 12/2019, <https://www.bls.gov/opub/reports/womens-databook/2019/home.htm>

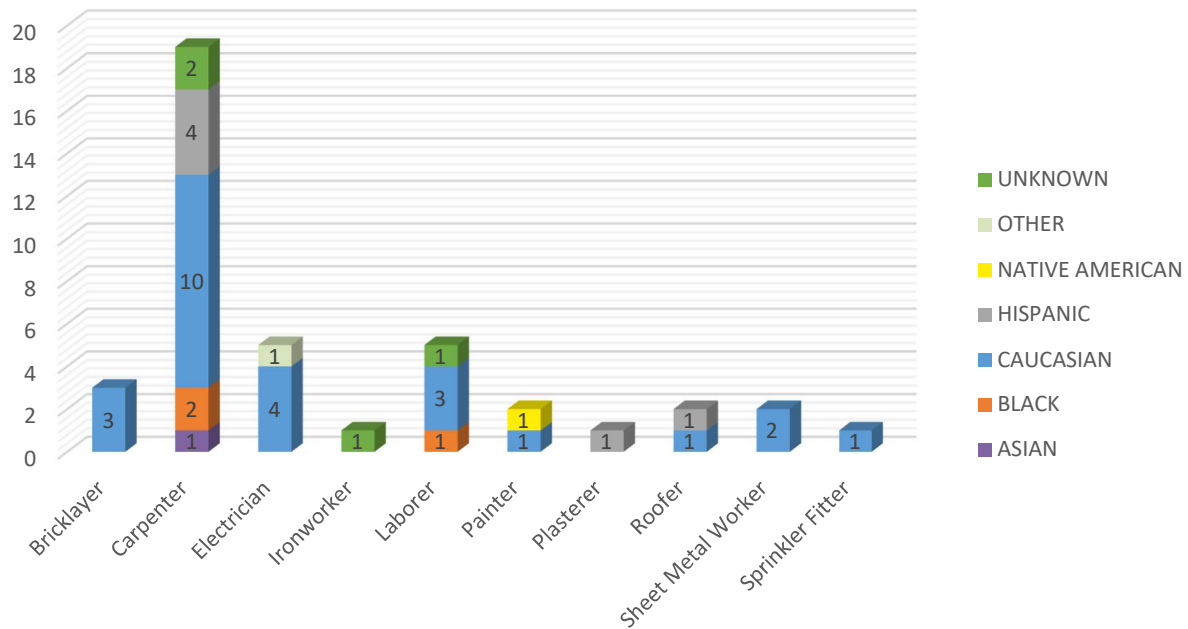
<sup>6</sup> Haines, Kelly. "Regional Construction Workforce Market Study." 2018. PDF File. These numbers were current as of 2016, the last year this data was analyzed.

The available regional data does not take residential construction into consideration, but a snapshot of the construction workforce on the 9 particular Home Forward projects shows that among 1723 unique tradespeople who performed work in 2019, only 92 (5%) among them were women. This sample would suggest that women are slightly better represented on Home Forward's residential construction projects than they are in the region's non-residential construction projects, but overall, are less represented than the national average of women in the construction trades.

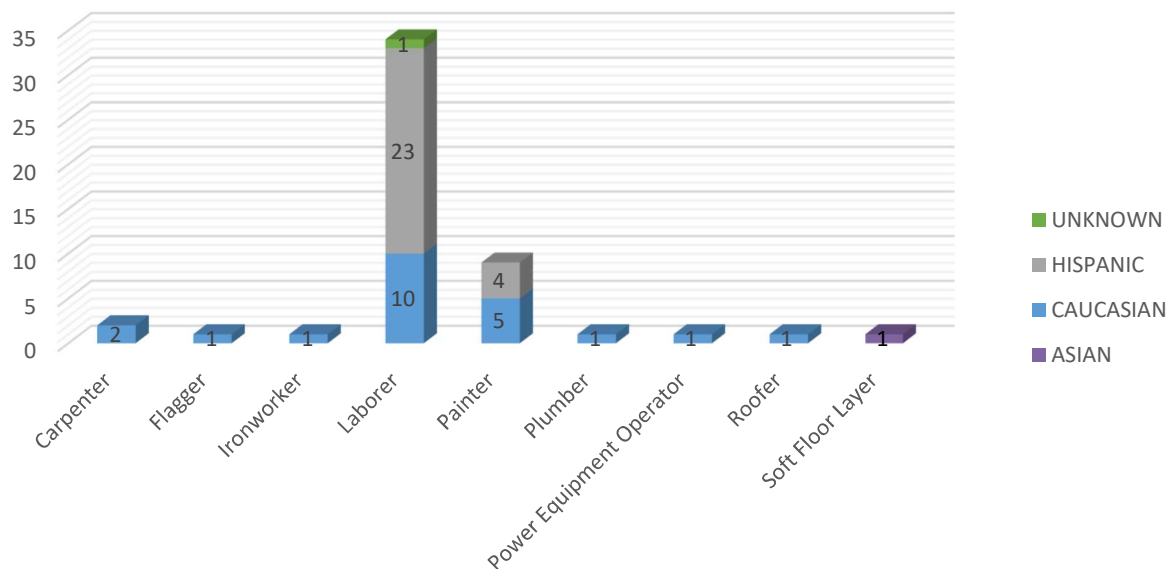


Among those 92 women, approximately 43% are non-white, and 44% are apprentices. These 92 women performed 26,466 (7%) of the labor hours on these 9 projects reported in FY 2019. An overwhelming 63% of those hours were performed by female apprentices. Further analysis of the tradeswomen performing on Home Forward jobs show the highest concentrations among carpenters and laborers, which is statistically in line with the overall workforce, as those two trades comprise the majority of construction workers on Home Forward's projects.

## Female Apprentices by Trade & Ethnicity



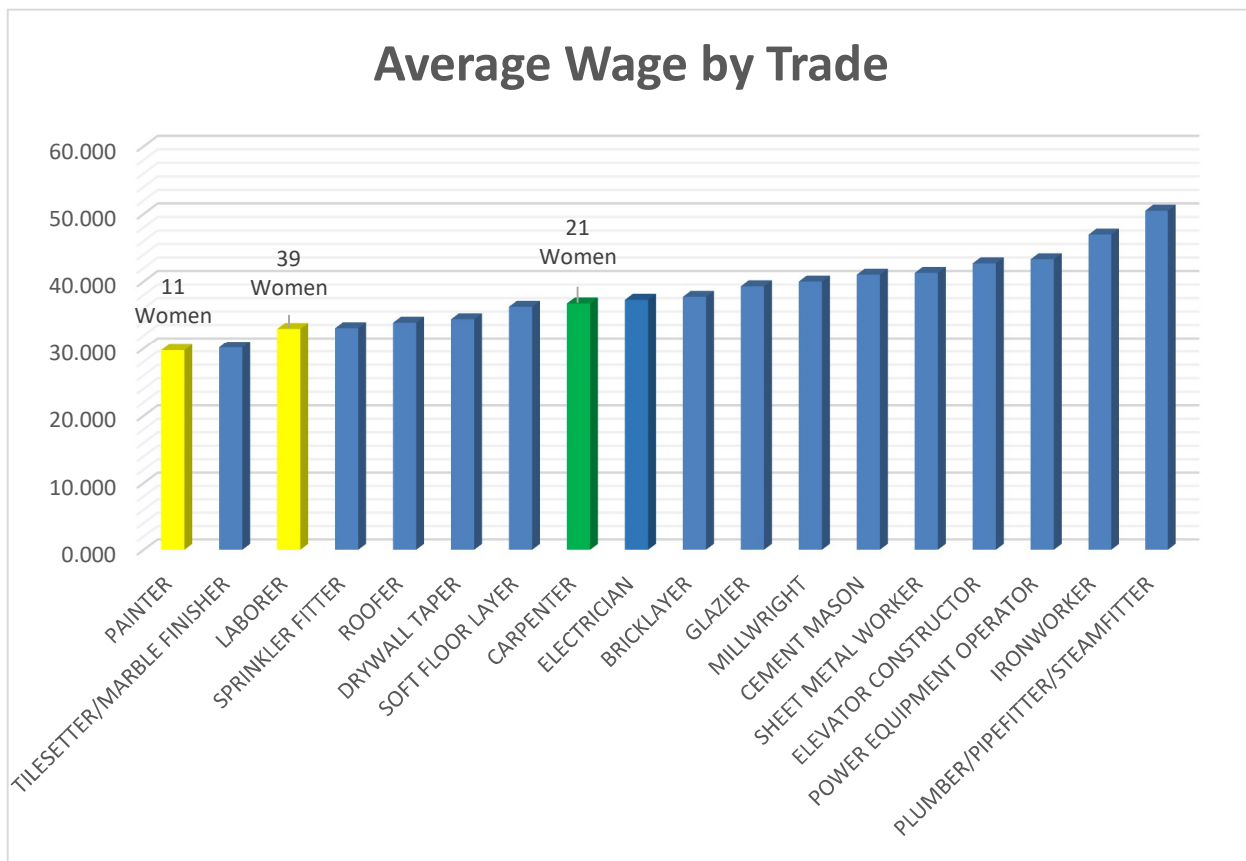
## Female Journeyworkers by Trade & Ethnicity



While prevailing wages mitigate gender pay-gaps in the construction trades, examining the jobs in which women are the most represented—laborers, carpenters and painters—shows



that women predominantly remain in the bottom half of earners within the construction trades.



Home Forward has been a participating public agency in the Construction Careers Pathways Project (C2P2) sponsored by Metro. This pool of public agencies across the Portland metropolitan area has been engaged in conversations aimed at creating a regional framework for increasing the numbers of women and people of color in the construction trades. The goal of this workgroup is to agree upon and implement uniform contract requirements for the participation of women and people of color, with the outcome being an increased demand for diversity that would drive contractors and unions to make concerted efforts for outreach and training to meet the workforce requirements on public improvement work. Additionally, a regional framework for workforce would create a new norm for contractors, who would then come to expect the same requirements regardless of which public agency owned the project on which they were performing. Participating public agencies would contribute a small percentage of their project costs to a joint fund to support training, outreach, and technical support toward expanding the construction workforce among women and people of color.

## Conclusions

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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 COBID contracting goals, as well as continue to support the diverse workforce and businesses in our community. As expected, overall COBID engagement results are dependent upon the agency's construction activity year over year, and these figures continue to fluctuate depending not only on the amount of construction performed, but also the type of work and building types.

Looking ahead for future contracting years, workforce equity and development, as well as the growing deficit of construction workers in the Portland Metro Area continues to be at the forefront of conversations around equity in contracting among public owners in the metro area. Home Forward will continue in these ongoing conversations around the efforts to increase and diversify the construction workforce to the benefit of our local economy and to the benefit of the workplace culture of the construction industry.

# RESOLUTIONS



MEMORANDUM

To:	Board of Commissioners	Date:	May 19, 2020
From:	Amanda Saul, Assistant Director, Development & Community Revitalization 503.802.8552	Subject:	Authorize Execution of Contract for Construction Manager/General Contractor Services for the Baldwin Permanent Supportive Housing Resolution 20-05-02

The Board of Commissioners is requested to authorize Home Forward to execute a contract in the amount of \$137,052, for construction management and general contracting (CM/GC) preconstruction services with Bremik Construction for a new 60-unit, four story, permanent supportive housing building, currently known as Baldwin. This contract will be amended at the start of construction to the Gross Maximum Price, currently estimated to be \$10,700,000. The Baldwin development will be located on a Home Forward owned site at 7656 N. Interstate Ave. in North Portland. The site is currently zoned appropriately for this project.

This action supports Home Forward's Strategic Plan Goal One Portfolio: Our real estate is stable for generations to come and meets the needs of the people and neighborhoods it serves.

In the 2019 Oregon State Legislature, \$50 million in funding was provided to Oregon Housing and Community Services (OHCS) for the Permanent Supportive Housing Capital program for 2019 – 2021 biennium. Through a competitive process, Home Forward, in partnership with the Urban League of Portland, was selected to participate in a state-sponsored permanent supportive housing training program that resulted in participants responding to a Notice of Funding Availability (NOFA) from OHCS for a permanent supportive housing project. Home Forward and Urban League completed the training and were successful in obtaining a \$9,000,000 grant from OHCS for construction, and an

additional grant to support the permanent supportive housing services and on-going rental assistance for all 60 units.

Baldwin will be a site-based permanent supportive housing project intended for those who self-identify as desiring culturally specific services for African Americans, with a special emphasis on those who suffer from chronic homelessness with disabling conditions that limit their abilities to live without ongoing supportive services. The Baldwin project will serve some of the most severely impacted members of the homeless community in the Portland metro area.

Home Forward will be the developer, owner and property manager. Urban League of Portland will provide the supportive services also funded by the OHCS grant. The housing will be financed by the OHCS grant, non-competitive 4% Low Income Housing Tax Credits and additional financial sources. Construction hard costs are estimated at \$10,700,000.

Home Forward's Procurement & Contracts Department issued a Request for Proposals for CM/GC services, from firms on its short-list, in January 2020. Five proposals were received and evaluated by a selection committee comprised of: three Home Forward employees, a Home Forward Board Member and an Urban League representative. A representative from SERA (Baldwin architect) also participated in the interviews and provided input but not a score. Evaluation criteria included:

- Overall quality and experience of the team
- The team's portfolio of work
- COBID participation (Oregon's Certification Office for Business Inclusion & Diversity)
- Fee

Three teams were invited for interviews: Walsh Construction Company, Essex General Construction and Bremik Construction. Following interviews, the selection committee identified the team led by Bremik Construction as the most qualified to undertake this development. Bremik Construction plans to meet the 20% COBID participation goals and the Workforce Hiring and Training goals.

The cost for pre-construction services including MEP (mechanical electrical and plumbing) design assist is \$137,052. A contract amendment for the Guaranteed Maximum Price (GMP) of construction will be presented to the Board of Commissioners after the project is bid and reconciled prior to the financial closing.

Construction is expected to start in summer of 2021, with a construction duration of one year.

The Real Estate and Development (READ) Committee of Home Forward's Board of Commissioners reviewed a draft of this resolution prior to the publication of the agenda for the May 2020 meeting.



## RESOLUTION 20-05-02

RESOLUTION 20-05-02 AUTHORIZES THE EXECUTIVE DIRECTOR TO EXECUTE CONTRACT WITH BREMIK CONSTRUCTION FOR CONSTRUCTION MANAGER / GENERAL CONTRACTOR SERVICES FOR THE DEVELOPMENT OF BALDWIN, A PERMANENT SUPPORTIVE HOUSING DEVELOPMENT

WHEREAS, Home Forward, a housing authority and a public body corporate and politic of the State of Oregon, seeks to encourage the provision of long term housing for low income persons residing in Multnomah county, Oregon; and

WHEREAS, Home Forward owns the 20,000 SF property located at 7656 N. Interstate Ave. that is properly zoned for the Baldwin development; and

WHEREAS, Home Forward and Urban League of Portland will execute a Memorandum of Understanding (MOU) that outlines the terms of a collaborative partnership for permanent supportive housing services for Baldwin; and

WHEREAS, Home Forward staff managed a competitive procurement process to select and award Bremik Construction the contract to undertake construction manager and general contractor (CM/GC) services for the Baldwin development; and

WHEREAS, Home Forward will work with Bremik Construction to try and meet the 20% COBID participation; and

NOW, THEREFORE, BE IT RESOLVED, that the Board of Commissioners of Home Forward authorizes and directs the Executive Director to execute a Contract in an amount of \$137,052 for the preconstruction phase with Bremik Construction CM/GC service for the Baldwin development.

ADOPTED: MAY 19, 2020

Attest:

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Michael Buonocore, Secretary

Home Forward:

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Damien R. Hall, Chair





MEMORANDUM

To:	Board of Commissioners	Date:	May 19, 2020
From:	Amanda Saul, Assistant Director, Development & Community Revitalization 503.802.8552	Subject:	Authorize Execution of Contract for Professional Architecture and Engineering Services for Baldwin Permanent Supportive Housing Resolution 20-05-03

The Board of Commissioners is requested to authorize Home Forward to execute a contract in the not to exceed amount of \$982,550 for professional architecture and engineering services with SERA for a new 60-unit, four story, permanent supportive housing building, currently known as Baldwin. The Baldwin development will be located on a Home Forward owned site at 7656 N. Interstate Ave. in North Portland. The site is currently zoned appropriately for this project.

This action supports Home Forward's Strategic Plan Goal One Portfolio: Our real estate is stable for generations to come and meets the needs of the people and neighborhoods it serves.

In the 2019 Oregon State Legislature, \$50 million in funding was provided to Oregon Housing and Community Services (OHCS) for the Permanent Supportive Housing Capital program for 2019 – 2021 biennium. Through a competitive process, Home Forward, in partnership with the Urban League of Portland, was selected to participate in a state-sponsored permanent supportive housing training program that resulted in participants responding to a Notice of Funding Availability (NOFA) from OHCS for a permanent supportive housing project. Home Forward and Urban League completed the training and were successful in obtaining a \$9,000,000 grant from OHCS for construction, and an additional grant to support the permanent supportive housing services and on-going rental assistance for all 60 units.

Baldwin will be a site-based permanent supportive housing project intended for those who self-identify as desiring culturally specific services for African Americans, with a special emphasis on those who suffer from chronic homelessness with disabling conditions that limit their abilities to live without ongoing supportive services. The Baldwin project will serve some of the most severely impacted members of the homeless community in the Portland metro area.

Home Forward will be the developer, owner and property manager. Urban League of Portland will provide the supportive services also funded by the OHCS grant. The housing will be financed by the OHCS grant, non-competitive 4% Low Income Housing Tax Credits and additional financial sources.

Home Forward's Procurement & Contracts Department issued a Request for Proposals for Professional Architectural and Engineering Services to the architecture firms on its short-list in January 2020. Seven proposals were received and evaluated by a selection committee comprised of two Home Forward employees and an Urban League representative. Evaluation criteria included:

- Overall quality and experience of the team
- The team's portfolio of work
- COBID participation (Oregon's Certification Office for Business Inclusion & Diversity)
- Fee

Three teams were invited for interviews: LRS Architects, William Kaven and SERA. Following interviews, the selection committee identified the team led by SERA as the most qualified to undertake this project. SERA plans to meet the 20% COBID participation goals. Of SERA's team of nine engineers and consultants, five are COBID certified firms.

The full scope of work will include architecture and engineering services from programming through construction administration. SERA will also support Home Forward and Urban League during their community outreach efforts in the beginning phase of the project. Construction is expected to start in late spring of 2021. This resolution will authorize architecture and engineering services with SERA for a not to exceed amount of \$982,550.

The Real Estate and Development (READ) Committee of Home Forward's board

reviewed a draft of this resolution prior to the publication of the agenda for the May 2020 meeting.



## **RESOLUTION 20-05-03**

### **RESOLUTION 20-05-03 AUTHORIZES THE EXECUTIVE DIRECTOR TO EXECUTE A CONTRACT WITH SERA FOR ARCHITECTURE AND ENGINEERING SERVICES FOR THE DEVELOPMENT OF BALDWIN, A PERMANENT SUPPORTIVE HOUSING DEVELOPMENT**

**WHEREAS**, Home Forward, a housing authority and a public body corporate and politic of the State of Oregon, seeks to encourage the provision of long term housing for low income persons residing in Multnomah county, Oregon; and

**WHEREAS**, Home Forward owns the 20,000 SF property located at 7656 N. Interstate Ave. that is properly zoned for the Baldwin development; and

**WHEREAS**, Home Forward and Urban League of Portland will execute a Memorandum of Understanding (MOU) that outlines the terms of a collaborative partnership for permanent supportive housing services for Baldwin; and

**WHEREAS**, Home Forward staff managed a competitive procurement process to select and award SERA the contract to undertake architecture and engineering services for the Baldwin development; and

**WHEREAS**, Home Forward will work with SERA to try and meet the 20% COBID participation; and

**WHEREAS**, pursuant to the needs of the project, Home Forward staff recommend executing a contract with SERA and issuing a Notice to Proceed for all architecture and engineering service from programming through construction administration; and

**NOW, THEREFORE, BE IT RESOLVED**, that the Board of Commissioners of Home Forward authorizes and directs the Executive Director to execute a Contract in a not to exceed amount of \$982,550 for architecture and engineering service for the Baldwin development.

**ADOPTED: MAY 19, 2020**

**Attest:**

**Home Forward:**

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Michael Buonocore, Secretary

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Damien R. Hall, Chair



## MEMORANDUM

To: Board of Commissioners

Date: May 19, 2020

From: Dena Ford Avery, Director of  
Housing Choice Vouchers  
503.802.8568

Subject: Authorize Changes to the  
Administrative Plan for Rent  
Assistance  
Resolution 20-05-04

Ian Slingerland, Director of Homeless  
Initiatives  
503.802.8370

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The Board of Commissioners is requested to authorize changes to the Administrative Plan which governs Home Forward's Housing Choice Voucher Program. These changes incorporate the "Tenant-Based Voucher Set Aside Policies" activity from Home Forward's Moving to Work (MTW) plan into the Administrative Plan and establishes a set aside for the Homeless Family System of Care.

This activity supports the One System Goal of our Strategic Plan: We leverage our role as the largest provider of affordable housing in Oregon to improve collaboration and efficacy between systems impacting people in poverty.

### Implementation of Home Forward's Tenant Based Voucher Set Aside MTW Activity

Home Forward's MTW plan includes an activity allowing Home forward to establish Housing Choice Voucher (HCV) set asides in certain circumstances under which Home Forward will accept referrals from specified partners and award referred households vouchers without utilizing the HCV wait list. The set aside activity from the MTW plan is included as an attachment.

Attached is language we propose to add to our HCV Administrative Plan implementing the set aside activity.

#### Homeless Family System of Care Set Aside

In 2015, Home Forward established a limited HCV wait list preference for families referred from Multnomah County's Homeless Family System of Care (HFSC). This preference was structured to sunset once 200 families leased units under this preference. Given this "sunset" language, new families were not referred from the Homeless Family System of Care as families selected through the preference left the Housing Choice Voucher Program. There are currently about 160 families remaining on the HCV program from initial lease-up under this preference.

Attached is language we propose to add to our HCV Administrative plan establishing a set aside for the HFSC that will bring the number of families served up to 200 and maintain at that level.

Attached is an information sheet outlining program access and outcomes by race and ethnicity.

As background, also attached is the Board memo from 2017 evaluating the lease-up phase of our partnership with the Homeless Family System of Care.

#### ATTACHMENTS

1. May 2020 Proposed Changes Housing Choice Voucher Administrative Plan TB Set-Asides
2. MTW Tenant Based Voucher Set Aside Activity, FY 2019 MTW Plan
3. HFSC access and outcome data by race and ethnicity
4. HFSC Preference lease-up evaluation memo from 2017



## RESOLUTION 20-05-04

RESOLUTION 20-05-04 AUTHORIZES HOME FORWARD TO AMEND LANGUAGE IN THE ADMINISTRATIVE PLAN WHICH GOVERNS PROCESSES AND PROCEDURES IN THE HOUSING CHOICE VOUCHER PROGRAM

WHEREAS, Home Forward seeks leverage our role as the largest provider of affordable housing in Oregon to improve collaboration and efficacy between systems impacting people in poverty; and

WHEREAS, Home Forward seeks to implement the Tenant Based Voucher Set Aside activity from our approved MTW plan;

WHEREAS, Home Forward is committed to continuing to provide leadership within A Home for Everyone, a community-wide effort to better assist people experiencing homelessness in Portland; and

WHEREAS, in 2015, Home Forward adopted a limited Housing Choice Voucher preference for families referred from Multnomah County's Homeless Family System of Care; and

WHEREAS, Home Forward wishes to recommit to our partnership with the Homeless Family System of Care;

NOW, THEREFORE, BE IT RESOLVED, the Board of Commissioners of Home Forward hereby authorizes the Executive Director to approve changes to the Administrative Plan for the Housing Choice Voucher program to implement the MTW Tenant Based Voucher Set Aside activity and create set-aside for Multnomah County's Homeless Family System of Care.



ADOPTED: MAY 19, 2020

Attest:

Home Forward:

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Michael Buonocore, Secretary

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Damien R. Hall, Chair

# Housing Choice Voucher Administrative Plan: May 2020 Proposed Changes

## 4-III.B. (Page 4-17)

### Regular HCV Funding (*new language in italics*)

Regular HCV funding may be used to assist any eligible family on the waiting list *or referred from partner agency as part of PHA's Tenant-Based Voucher Set Asides (MTW)*. Families are selected from the waiting list *or as part of PHA's Tenant-Based Voucher Set Asides* according to the policies provided in Section 4-III.C.

## 4-III.C. (Page 4-23. After existing "Order of Selection" language. All language below is new.)

### Tenant-Based Voucher Set Asides

Through Tenant-Based Voucher Set Asides, the PHA uses its MTW authority to align MTW Housing Choice Vouchers with services and supports from partners designed to increase housing stability and success for families with barriers to succeeding with a voucher alone. The Tenant-Based Voucher Set Asides allow the PHA, in specific instances, to select families for Housing Choice Voucher assistance without using the tenant-based voucher waiting list.

With Tenant-Based Voucher Set Asides, Home Forward accepts referrals from specified partners and awards those households the dedicated vouchers. Written documentation of the referral is maintained in the tenant file by Home Forward, but Home Forward does not add these households to the Housing Choice Voucher waiting list. This flexibility increases efficiency and reduces the number of days a family has to wait between referral and issuance of the voucher.

For each Tenant-Based Voucher Set Aside, prior to accepting referrals and issuing vouchers Home Forward executes a Memorandum of Understanding with the partner specifying:

- Number of vouchers included in the Tenant-Based Voucher Set Aside;
- Eligibility criteria for the Tenant-Based Voucher Set Aside;
- Criteria for determining how families will be selected and referred to Home Forward by the partner(s);
- Type and duration of services the partner(s) will make available to the household; and
- All referrals must be in writing and include a certification from the partner(s) that the family was selected and referred to Home Forward in accordance with the criteria outlined in the Memorandum of Understanding.

### Approved Tenant-Based Voucher Set Asides

#### Homeless Family System of Care

Home Forward sets aside up to 200 total vouchers for families currently served by Multnomah County's Homeless Family System of Care.

Previously, Home Forward instituted a one-time preference in its Housing Choice Voucher program for up to 200 families served by Multnomah County's Homeless Family System of Care. At the point 200 families leased-up under the preference, the preference sunsetted. New

families were not referred from the Homeless Family System of Care as families selected through the preference left the Housing Choice Voucher Program.

Home Forward uses a Tenant-Based Set Aside to serve up to 200 families referred by Multnomah County's Homeless Family System of Care. Remaining families from the previous preference for families referred from the Homeless Family System of Care will be included in the count of up to 200 families covered by the Tenant-Based Voucher Set Aside.

## 15 Tenant-Based Voucher Set Aside Policies

### Approved FY2016, Implemented FY2016

Home Forward operates or participates in a number of programs that have been designed to align housing with supportive services in order to ensure success for participating families. These include local non-traditional rent assistance programs, our local project based voucher programs, and the Veterans Affairs Supportive Housing (VASH) program. In all cases, jurisdictional or community partners provide supports for families who access the housing, with target populations including families exiting homelessness, former foster youth, seniors, and people with disabilities.

#### MTW authorization:

Attachment C, Section D(4) – Waiting List Policies

#### Statutory objective:

Reduce cost and achieve greater cost effectiveness in Federal expenditures

Home Forward has found that leveraging our housing resources with services from partners often results in better housing stability and success for families with barriers to succeeding with a voucher alone. In addition to the above programs, we have also established a series of limited preferences for tenant-based vouchers. Through these limited preferences, specific community partners refer target populations to Home Forward for housing as they provide services. Among the set aside programs we've instituted are:

- Home Forward sets aside up to 200 vouchers for families currently served by Multnomah County's Homeless Family System of Care.
- We also set aside up to 50 vouchers for families that include a veteran experiencing homelessness, who are ineligible for HUD-VASH vouchers. These families are referred by and received services from Transition Projects, Inc.

HUD regulations for tenant-based vouchers require a housing authority to select all participants from a waiting list. In order to adhere to regulations, current families served by the two set aside programs are chosen and referred to Home Forward by the community partner, added to the tenant based voucher waiting list, then immediately pulled from the waiting list to be served with the vouchers that are dedicated to the program. This process is inefficient, time-consuming and cumbersome.

Home Forward is proposing to instead model the referral and selection procedures after the existing VASH program. As with VASH, Home Forward will accept referrals from the specified partners and award those households the dedicated vouchers. Written documentation of the referral will be maintained in the tenant file by Home Forward, but Home Forward will not add these households to the waiting list to be immediately selected. This flexibility will increase efficiency and may reduce the number of days a family has to wait between referral and issuance of the voucher.

For each limited preference program, Home Forward will execute a Memorandum of Understanding with the partner specifying:

- Number of vouchers set aside for the preference;
- Eligibility criteria for the preference;
- Criteria for determining how families will be selected and referred to Home Forward by the partner(s);
- Type and duration of services the partner(s) will make available to the household; and

- Understanding that all referrals must be in writing and include a certification from the partner(s) that the family was selected and referred to Home Forward in accordance with the criteria outlined in the Memorandum of Understanding.

Home Forward will audit partner agencies to ensure that they adhere to selection criteria specified in the Memorandum of Understanding.

The initial lease-up of the current set aside programs Home Forward is complete. However, should they be renewed, Home Forward will shift to the referral system (with no waiting list) for these set aside programs as well.

### Impact on Statutory Objective(s)

Since households are referred for set aside vouchers by community partners, it is inefficient and duplicative for Home Forward to maintain a waiting list of the families that partners have selected, only to immediately pull those families off the list. Accepting referrals from the partners of the set aside program, who have selected families based on the criteria outlined in the Memorandum of Understanding, will create efficiencies.

### Changes or modifications:

We are not anticipating any changes to this activity.

### Activity Metrics:

Metric	Baseline	Benchmark	Final Projected Outcome
Agency cost savings (Standard Metric: CE#1)			
Total cost of task	FY2016: \$875	FY2020: \$0	\$0
Staff time savings (Standard Metric: CE#2)			
Total time to complete the task	FY2016: 29.5 hours	FY2020: 0 hours	0 hours
Decrease in wait list time (Standard Metric: HC#3) Note: This is a standard reporting metric used by HUD to measure impacts across agencies on a national level. Because households are immediately pulled from the waiting list, this will have no impact on this metric; but we have included it at HUD's request			
Average applicant time on wait list in months	FY2016: 0 months	FY2020: 0 months	0 months

### MTW Flexibility:

Home Forward uses MTW flexibility to blend program funds into a single budget used to fund Program Based Assistance. This allows Home Forward to administer a form of non-traditional rent assistance that can target households in crisis and help them reach or maintain housing stability.

## 1) Race/Ethnicity Data for Current sc8hfsc Families

Race/Ethnicity	HFSC Households		2019 Point-in-Time Count		Multnomah County		Multnomah County People in Poverty	
People of Color	126	77%	1,529	38%	232,252	29%	74,471	46%
White Alone, Not Hispanic	38	23%	2,346	58%	556,207	71%	86,403	54%
Unknown/Not Reported	0	0%	140	3%	0	0%	0	0%
<b>Total</b>	<b>164</b>	<b>100%</b>	<b>4,015</b>	<b>100%</b>	<b>788,459</b>	<b>100%</b>	<b>160,874</b>	<b>100%</b>

Alone or in Combination	HFSC Households		2019 Point-in-Time Count		Multnomah County		Multnomah County People in Poverty	
African American/Black	67	41%	648	16%	56,569	7%	18,660	12%
Asian	14	9%	85	2%	72,700	9%	12,298	8%
Hawaiian/Pacific Islander	9	5%	119	3%	8,515	1%	1,423	1%
Hispanic/Latino	29	18%	373	9%	88,996	11%	31,658	20%
Native American	19	12%	467	12%	19,879	3%	2,312	1%
White	81	49%	2,800	70%	652,045	83%	107,988	67%
Other <sup>1</sup>	0	0%	83	2%	26,469	3%	7,381	5%

HFSC data includes all current households as well as any households issued a voucher and searching.

Multnomah County People in Poverty data for Alone or in Combination are those households at less than 125% of the poverty level. Data for alone or in combination is not available for all households in poverty, regardless of the poverty level.

### Data Sources

2019 Point-in-Time Count: Multnomah County Joint Office of Homeless Services

Multnomah County: US Census Bureau, 2017 American Community Survey (ACS) Data, table DP05

Multnomah County People in Poverty: US Census Bureau, 2017 ACS Data, table S1701/S103

<sup>1</sup> For 2019 Point-in-Time Count: this category includes African, Middle Eastern, and Slavic. For Multnomah County and Multnomah County People in Poverty, no definition is provided from the Census Bureau.

## 2) Race/Ethnicity Data for All Families that Exited from sc8hfsc

Race/Ethnicity	HFSC Households that Exited		Tenant-Based HCV Households that Exited		Work-Focused Tenant-Based HCV Households that Exited	
People of Color	12	48%	583	47%	284	66%
White Alone, Not Hispanic	13	52%	659	53%	144	34%
<b>Total</b>	<b>25</b>	<b>100%</b>	<b>1,242</b>	<b>100%</b>	<b>428</b>	<b>100%</b>

Alone or in Combination	HFSC Households that Exited		Tenant-Based HCV Households that Exited		Work-Focused Tenant-Based HCV Households that Exited	
African American/Black	6	24%	378	30%	191	45%
Asian	0	0%	75	6%	22	5%
Hawaiian/Pacific Islander	0	0%	11	1%	4	1%
Hispanic/Latino	6	24%	90	7%	51	12%
Native American	1	4%	57	5%	29	7%
White	19	76%	764	62%	203	47%

## 3) Voucher Retention

The attrition and retention rates for HFSC households and the HCV program from October 2015 through and including April 2020 are:

Program	Attrition Rate	Retention Rate
HFSC Households	3%	97%
HCV Program	10%	90%

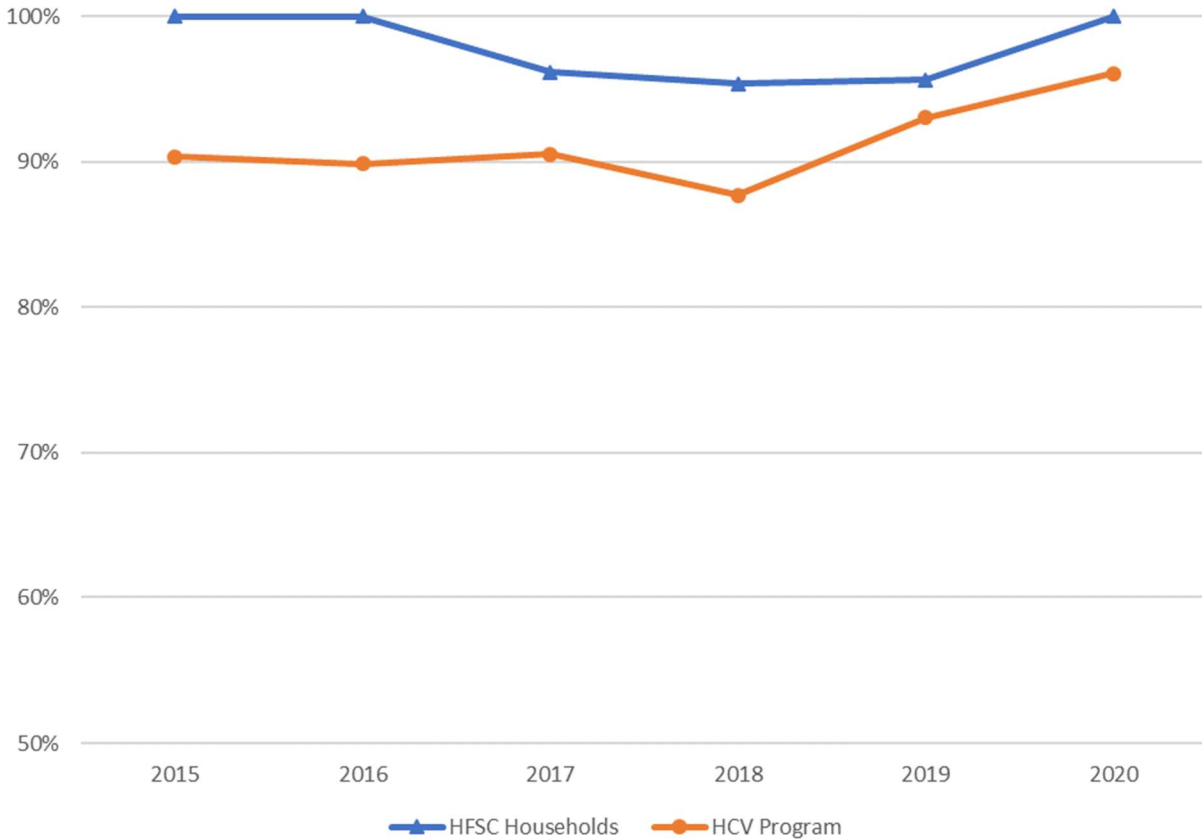
Looking at the voucher retention rate over time:

Year	HFSC Households	HCV Program
2015 <sup>2</sup>	100%	90%
2016	100%	90%
2017	96%	91%
2018	95%	88%
2019	98%	93%
2020 <sup>3</sup>	100%	90%

<sup>2</sup> 2015 data is October 2015 – December 2015 (3 months)

<sup>3</sup> 2020 data is January 2020 – March 2020 (3 months)

### Voucher Retention 10/2015 - 4/2020



#### 12-month voucher retention

In order to be counted as an eligible household for the purposes of 12-month voucher retention, a household needed to have leased up by April 1, 2019. Households that leased up after April 2019 are not counted for purposes of 12-month retention as they have not yet reached 12-months since initial lease.

Program	12-Month Retention Eligible Households	12-Month Retention Households	12-Month Retention Percentage
HFSC Households	203	179	88%
HCV Program	8,665	8,296	96%



## 12-month assistance retention

Households are counted if they do not leave the program before 12 months of assistance (does not have to be consecutive).

Program	12-Month Assistance Retention Eligible Households	12-Month Assistance Retention Households	12-Month Retention Percentage
HFSC Households	203	190	94%
HCV Program	8,665	7,708	89%

## 4) Family Characteristics

	Homeless Family Systems of Care Preference	MTW Housing Choice Vouchers: All Tenant-Based	MTW Housing Choice Vouchers: Work Focused Tenant-Based
Families with Children	88%	36%	79%
Families headed by Senior	6%	49%	0%
Families headed by person with a Disability	12%	52%	0%
Work Focused Families	84%	34%	100%
Average Household Size	3.37	2.25	3.53
Average Household Income	\$1,054	\$1,222	\$1,525
Average Monthly Rent	\$1,339	\$1,148	\$1,366
Average HAP Subsidy to Landlord	\$1,031	\$816	\$907
Average Tenant Rent Payment	\$308	\$332	\$459

## 5) Housing Choice

	Homeless Family Systems of Care Preference	MTW Housing Choice Vouchers: All Tenant-Based	MTW Housing Choice Vouchers: Work Focused Tenant-Based
Downtown Portland	0%	4%	1%
NW Portland	0%	5%	1%
Gresham / Fairview / Troutdale	12%	11%	12%
Inner & Central NE	12%	12%	11%
Inner & Central SE	8%	10%	8%
N. Portland / St. Johns	6%	8%	10%
Outer NE	23%	13%	16%
Outer SE	37%	32%	38%
SW Portland	3%	5%	4%
New HCV Landlord as Pct of Lease Ups	14%	6%	10%



## MEMORANDUM

To: Board of Commissioners

Date: November 8, 2017

From: Ian Slingerland, Director of  
Homeless Initiatives  
503.802.8565

Subject: A Home for Everyone Set Aside  
Voucher Preferences

Candace Jamison,  
Program Supervisor  
503.802.8584

The purpose of this memorandum is to update the Board of Commissioners on the Housing Choice Voucher set-aside preferences for households leaving homelessness adopted in collaboration with the A Home for Everyone effort. An evaluation report on these set-aside preferences is attached. This briefing is informational only; no action is required by the Board of Commissioners.

Contributing set-aside vouchers to the A Home for Everyone effort supports the current Strategic Plan's One System objective as we continue to leverage our role as the largest provider of affordable housing in Oregon to improve collaboration and efficacy between systems impacting people in poverty.

## BACKGROUND

A Home for Everyone is a community-wide effort to better assist people experiencing homelessness in Multnomah County. Established through a charter adopted by the cities of Portland and Gresham, Multnomah County and Home Forward, A Home for Everyone is led by an Executive Committee comprised of jurisdictional and funding partners including the Mayor of Portland and the Multnomah County Chair. By charter, Home Forward has a seat on the A Home for Everyone Executive Committee.

In April 2015, the Board of Commissioners adopted two limited Housing Choice Voucher (HCV) set-aside preferences in support of system planning recommendations from A Home for Everyone. The first limited voucher set-aside preference was approved for 200 families exiting homelessness and served by Multnomah County's Homeless Family System of Care (HFSC). The second limited set-aside preference was approved for 50 vouchers for veterans experiencing homelessness who are ineligible for a Veterans Affairs Supportive Housing (VASH) voucher.

### SHARED OUTCOME GOALS

For both Housing Choice Voucher set-aside preferences, Home Forward entered into Memorandums of Understanding connecting our housing subsidy to supportive services provided by system partners and identifying outcome goals. The HFSC set-aside preference includes a partnership with Multnomah County and JOIN, while the set-aside preference for veterans includes a partnership with Transition Projects. Both partnerships identified 1) system alignment, 2) decreased homelessness, and 3) long-term housing stability as outcome goals. Our evaluation reviews performance relative to these outcome goals and compares key metrics between households served by these set-aside preferences and other households served by the HCV program. Both set-aside preferences have demonstrated success with regards to system alignment and housing stability for households served. Given the comparative scale of homelessness in the community, the impact on overall rates of homelessness is more ambiguous.

Housing Choice Vouchers provided by Home Forward to assist families leaving homelessness have been a significant resource to address the growing number of families with children impacted by the regional housing crisis and homelessness, and Home Forward's alignment of our vouchers with community services and resources through the Homeless Family System of Care allows families to receive wrap around services and improved housing stability. To date, families referred for a voucher under this set-aside preference received a combined \$2 million dollars in placement and retention services and short-term rent assistance dollars through the Homeless Family of Care's Mobile Housing Team.

Our dedication of vouchers to Veterans played an important role in addressing a specific gap in the system for veterans in need of housing, and were critical to our community's

ability to achieve certification of functionally ending Veterans homelessness from the US Interagency Council on Homelessness.

To review long term housing stability, Home Forward assessed the lease up success, speed of lease up, and housing retention at one year of families housed under the set-aside preferences compared to other Housing Choice Voucher participants. In each case, the families housed under these two set-aside preferences leased up at a higher rate, more quickly, and have remained housed at a higher rate than other Housing Choice Voucher participants. These improved metrics are particularly remarkable when you consider that each of the families housed under these two set-aside preferences recently left homelessness and faced significant barriers to housing lease up and stability.

	HFSC Set-Aside Preference	Veteran Set-Aside Preference	All Tenant-Based HCV Participants
Lease Up Success Rate	85%	90%	73%
Voucher to Lease Up (Time)	85 days	86 days	91 days
Housing Retention at 12 months (Percent)	92%	95%	91%

While the overall count of people experiencing homelessness in the 2017 Point in Time Count increased roughly 10% from the 2015 count, the number of people in families with children experiencing homelessness remained level from 2015 to 2017, and the count of Veterans increased 6%. These numbers, relative other population groups and the experiences of other cities, reflect both the impact of our efforts and the continued need to focus resources on these populations to see reductions.

## HOUSEHOLDS SERVED

Home Forward began accepting referrals for families and Veterans exiting homelessness in Summer 2015 and completed lease up in early 2017.

### *Homeless Family System of Care*

The HFSC preference allowed Home Forward to serve a greater proportion of households with children under the age of 18 in the home (96%) than are served by the traditional voucher program (37%). The traditional tenant-based Housing Choice Voucher program

has trended away from serving families with children for over a decade—set-asides such as the one for the HFSC provide one avenue for intentionally responding to this trend.

By collaborating with a system that utilizes culturally specific service agencies, the HFSC set-aside preference supports Home Forward’s efforts to address disparities in poverty and homelessness faced by communities of color. Among the HFSC households served, 66% identified as People of Color compared to 50% in the overall voucher program.

The average monthly Housing Assistance Payment (HAP) subsidy to landlords for Homeless Family System of Care families is higher than other families served through the voucher program. This is due in part to lower incomes on average for HFSC families (51% of HFSC families rely on TANF public assistance as their sole source of income). It is also due to more recent lease-ups for HFSC families resulting in higher contract rents and payment standards. Staff will continue to assess whether the higher costs per household continues as the length of tenure for HFSC families begins to resemble the broader, traditional, tenant-based Housing Choice Voucher program.

#### *Veterans Ineligible for VASH*

Demographics for the VASH ineligible Veteran households largely mirror those of VASH households, but both programs serve a smaller proportion of Veterans that identify as people of color than those identified in the 2017 Point in Time Count of Homelessness, particularly amongst Native American and Hispanic/Latino Veterans. This is an area for continuing analysis by Home Forward and in A Home for Every Veteran, the Veterans initiative of A Home for Everyone.

Incomes for Veterans served through this preference are considerably lower than those in the VASH program; this is most likely attributed to a correlation between VASH eligibility and other veteran benefits which VASH ineligible veterans do not receive.

#### *Conclusions*

These Housing Choice Voucher preferences dedicated to the lease up of families and veterans leaving homelessness were successful on several fronts. They were also encouraging and instructive for the staff who worked on implementation. Home Forward’s use of voucher set asides to respond to the needs of our community represents an intentional deployment of our resources in concert with our strategic plan. Consideration of how to build on these early successes will be important as the Board of Commissioners

develops an agency housing strategy that also recognizes current commitments and the significant and varied calls on Home Forward Housing Choice Voucher resources.

For a more thorough evaluation of both preferences including metrics and an in-depth look at lessons learned from our partnerships, please see the attached evaluation.

ATTACHMENT: Evaluation of Home Forward's "A Home For Everyone" Housing Choice Voucher Set Aside Preferences



## EVALUATION OF HOME FORWARD'S "A HOME FOR EVERYONE" HOUSING CHOICE VOUCHER SET-ASIDE PREFERENCES

### **A Home for Everyone Set Aside Preferences: Background**

A Home for Everyone is a community-wide effort to better assist people experiencing homelessness in Multnomah County. Established through a charter adopted by the cities of Portland and Gresham, Multnomah County, and Home Forward, A Home for Everyone is led by an Executive Committee comprised of jurisdictional and funding partners including the Mayor of Portland and the Multnomah County Chair. This Executive Committee is supported by a Coordinating Board comprised of a diverse set of community, non-profit and government stakeholders. By charter, Home Forward has a seat on the A Home for Everyone Executive Committee.

In April 2015, Home Forward's Board of Commissioners adopted two limited Housing Choice Voucher preferences in support of planning recommendations from A Home for Everyone. These preferences strategically supported specific needs in the homeless response systems for families with children and veterans. The first limited preference was approved for 200 vouchers for families exiting homelessness and served by Multnomah County's Homeless Family System of Care. The second limited preference was approved for 50 vouchers for veterans experiencing homelessness who are ineligible for a Veterans Affairs Supportive Housing voucher. These limited preferences have been fully utilized

### **A Home for Everyone Set Aside Preferences: Evaluation Framework**

Implementation of these preferences included adoption of Memorandums of Understanding (MOU) with community partners outlining specific outcome goals. This evaluation:

- 1) Reviews performance of these preferences relative to those identified outcome goals;
- 2) Compares key metrics between households served by these preferences and other households served in the Housing Choice Voucher program; and
- 3) Identifies key challenges and learnings from our implementation of these preferences.

The evaluation utilizes data from Home Forward's Yardi case management system as well as surveys of Home Forward staff, staff at our service agency partners, and participant households.



## HOUSING CHOICE VOUCHER PREFERENCE FOR FAMILIES IN THE HOMELESS FAMILY SYSTEM OF CARE (HFSC)

### HFSC Background

The Homeless Family System of Care in Multnomah County includes Coordinated Entry into the system utilizing 211, Shelter Provision, and placement into permanent housing through use of multi-agency Mobile Housing Team (MHT). The system was initiated by Multnomah County Community Services Division, and now receives leadership through A Home For Everyone and the Joint Office for Homeless Services.

In spring 2015, Home Forward entered into a memorandum of understanding (MOU) with the Multnomah County Community Services Division and JOIN, a non-profit homeless services provider, to align resources, services, and funding in order to provide long-term housing stability for 200 families in the Homeless Family System of Care. JOIN is the lead of a group of seven community agencies that comprise the Homeless Family System of Care's Mobile Housing Team (MHT). The other organizations in the MHT are: El Programa Hispano, Immigrant and Refugee Community Organization, Human Solutions, Native American Youth and Family Center, Human Solutions, and Portland Homeless Family Solutions. The MHT provides families in the Homeless Family System of Care with housing placement and retention services utilizing a vulnerability tool to match those most in need with available resources.

### HFSC Shared Outcome Goals

Our MOU with Multnomah County and JOIN identified these shared outcome goals:

- 1) Alignment of existing resources to build a comprehensive system of care for families exiting homelessness in Multnomah County;
- 2) Decrease in family homelessness measured through 2015 and 2017 Point in Time (PIT) counts of homelessness; and
- 3) Increased ability of Home Forward's Housing Choice Voucher (HCV) program to effectively target and assist families exiting homelessness with long-term housing stability as measured by lease-up success, speed of lease-up and housing retention.

A new name for the Housing Authority of Portland



### *Alignment of Resources*

Housing Choice Vouchers provided by Home Forward to assist families leaving homelessness have been a significant resource to address the growing number of families with children impacted by the regional housing crisis and homelessness. Prior to the adoption of our set-aside preference, the Mobile Housing Team provided families with placement and retention assistance supported with locally funded, Rapid Rehousing rent assistance. The average length of rent assistance for families assisted with MHT Rapid Rehousing is five months with a median length of assistance of three months. Many families can find housing stability utilizing shorter-term Rapid Rehousing assistance—the 12-month housing retention rates for families assisted with MHT Rapid Rehousing is 79%. Some families, though, are unable to find housing stability with only limited term rent assistance. Significant research, including the U.S. Department of Housing and Urban Development's (HUD) Family Options Study<sup>1</sup> has demonstrated that the most effective intervention for families experiencing homelessness is priority access to a long-term housing subsidy. Access to long-term vouchers for the most vulnerable families in the Homeless Family System of Care increased the ability of MHT to tailor assistance to the individual needs and circumstances of the families served. In future years, we will be able to assess the relative impact on long-term housing stability on families served with shorter-term MHT Rapid Rehousing assistance compared to families assisted with these Housing Choice Vouchers.

Home Forward's alignment of our vouchers with community services and resources through the Homeless Family System of Care allows families to receive wrap around services and improved housing stability. To date, families referred for a voucher under this preference received a combined \$2 million dollars in placement and retention services and short-term rent assistance dollars through the Mobile Housing Team. Additionally, the MHT will now be staffed with two full-time workers focused on housing retention for families assisted with our vouchers.

In Home Forward's survey of Homeless Family System of Care households, families reported that the Mobile Housing Team played an important role in their lease up by helping them complete Home Forward paperwork (89%); understand Home Forward rules (74%); provide financial support (68%); and advocate with their landlords (47%). The collaboration between Home Forward and the MHT allowed many families to obtain housing stability that had once seemed improbable.

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<sup>1</sup> [https://www.huduser.gov/portal/family\\_options\\_study.html](https://www.huduser.gov/portal/family_options_study.html)

### *Decrease in Family Homelessness*

The period of 2015 to 2017 saw the rapid escalations of rents and low vacancy rates, and while the overall count of people experiencing homelessness in 2017 increased roughly 10% from the 2015 count, the number of people in families with children experiencing homelessness remained level from 2015 to 2017. At the same time, there was a significant decrease in the number of unsheltered families with children which is attributed to the addition of capacity to the family shelter system. In order to begin seeing a decrease in homeless families with children as well as a continued decrease in unsheltered families with children, community resources will need to be consistently dedicated and thoughtfully distributed to support these families.

### *Increased Ability of Home Forward's Housing Choice Voucher Program to Effectively Target and Assist Families Exiting Homelessness*

Families housed under this preference had a higher lease up rate (85%) than the overall tenant based Housing Choice Voucher program (73%). Families housed under this preference leased up faster (85 days) than the overall tenant based Housing Choice Voucher program (91 days), and families housed under this preference had a slightly higher housing retention rate (92%) than the overall tenant based Housing Choice Voucher program (91%).

	<b>Homeless Family System of Care Preference</b>	<b>MTW Housing Choice Vouchers: All Tenant-Based</b>	<b>MTW Housing Choice Vouchers: Work Focused Only<sup>2</sup></b>
<b>Lease Up Success Rate</b>	85%	73%	71%
<b>Voucher to Lease Up (Time)</b>	85 days	91 days	64 days
<b>Housing Retention at 12 months (Percent)</b>	92%	91%	90%

In each goal tracked, metrics reflected successful alignment of housing and services leading to positive outcomes for HFSC households. While some of the outcomes and improved metrics may appear modest it is important to remember that each of the families housed with these vouchers recently left homelessness and faced significant barriers to housing lease up and stability. In a survey Home Forward completed of HFSC participants, families disclosed that they faced many barriers to finding stable housing including 1) a lack of income (63%); 2) credit

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<sup>2</sup> "Work-Focused" is a category for purposes of Home Forward's rent reform policies. It includes all households that do not have a head of household who is a senior or a person with a disability. Ninety-one percent of HFSC HCV participant families fall into the work focused category so it is a useful reference point.

issues and a lack of units (43%); and 3) transportation issues, no childcare, homelessness, and high rents (37%).

### HFSC Households Served

Home Forward began accepting referrals from the Mobile Housing Team during the summer of 2015, and the lease up of the program concluded in winter 2017. The table below shows data on race and ethnicity for the HFSC preference alongside data from Home Forward's Housing Choice Voucher (HCV) program, the American Community Survey (ACS) and the 2017 Point in Time count of homelessness (PIT). These data sets are not entirely comparable, but using other data sets as reference can be illustrative.

### Demographics

	Homeless Family System of Care Preference	MTW Housing Choice Vouchers: All Tenant-Based	MTW Housing Choice Vouchers: Work Focused Tenant-Based	Families with Children Experiencing Homelessness: 2017 Point in Time Count	People in Multnomah County (American Community Survey)	People in Poverty: Multnomah County (American Community Survey)
<b>Race/Ethnicity</b>						
People of Color	71%	59%	69%	63%	29%	45%
White Alone, not Hispanic/Latino	29%	41%	31%	37%	71%	55%
<b>Race Alone or in Combination</b>						
African American/Black	37%	47%	58%	28%	7%	14%
Asian	9%	6%	4%	1%	9%	8%
Hawaiian or other Pacific Islander	7%	2%	2%	5%	1%	2%
Native American/Alaskan Native	11%	4%	5%	8%	3%	4%
Hispanic/Latino	25%	10%	13%	19%	11%	20%
White	51%	49%	41%	57%	83%	71%

### Addressing Racial Disparities

Compared to other Housing Choice Voucher households, Homeless Family System of Care families were more likely to be people of color. Reaching these communities is particularly critical as communities of color are disproportionately impacted by high rates of homelessness. Most communities of color face disproportionate rates of poverty in Multnomah County, but this alone does not explain the higher rates of homelessness in communities of color. Even relative to their disproportionate presence in poverty, most communities of color are over-represented in homelessness. Addressing these disparities will take sustained and intentional investment and effort. HFSC demographics reflect the Mobile Housing Team's utilization of culturally specific service providers. In particular Self Enhancement Inc., Native American Youth and Family

Center, El Programa Hispano and Immigrant and Refugee Community Organization were able to reach immigrant families and families of color experiencing homelessness.

## Family Characteristics

	Homeless Family System of Care Preference	MTW Housing Choice Vouchers: All Tenant-Based	MTW Housing Choice Vouchers: Work Focused Tenant-Based
<b>Families with Children</b>	96%	37%	81%
<b>Families headed by Senior</b>	1%	44%	0%
<b>Families headed by person with a Disability</b>	8%	51%	0%
<b>Work Focused Families</b>	91%	36%	100%
<b>Average Household Size</b>	3.47	2.28	3.50
<b>Average Household Income</b>	\$1,099	\$1,089	\$1,288
<b>Average Monthly Rent</b>	\$1,132	\$854	\$1,018
<b>Average HAP subsidy to landlord</b>	\$891	\$516	\$579
<b>Average Tenant Rent Payment</b>	\$286	\$338	\$439

### *Serving Families with Minor Children*

This preference allowed Home Forward to serve more households with children under the age of eighteen in the home than are served through the tenant-based HCV program as a whole. Ninety-six percent of families leased up through the Homeless Family System of Care are families with children. Fifty percent of the households leased as a result of the 2012 HCV waitlist are families with children, and only 37% of current households served in the tenant-based HCV program are families with children. HFSC families were larger on average (3.47 persons) than households served by our voucher program (2.28) but comparable to the average work focused household (3.50). By utilizing a preference that partners with agencies serving families with children experiencing homelessness we have been able to address a particularly vulnerable segment of the homeless population and intentionally address the trend away from serving families with kids in the larger Housing Choice Voucher program.

### *Family Income and Subsidy Costs*

Incomes for HFSC households were comparable to the voucher program as a whole, but less on average than work focused households; HFSC households had an average monthly income of \$1099 compared to \$1288 for work focused households. This can be attributed to the

significant portion of Homeless Family System of Care households reliant on limited TANF (Temporary Assistance to Needy Families) public assistance income opposed to wages.

Noteworthy income statistics include:

- 64% of HFSC households received TANF public assistance income (compared to 29% of work focused households overall);
- 51% of HFSC households only received TANF public assistance income (compared to 22% of work focused households).
- Conversely, 26% of HFSC received wage income (compared to 52% of work focused households).

While housing had been a primary concern for HFSC households, it is reasonable to assume that job stability was impacted by the families' experiences of homelessness. It is our hope that as these families stabilize in housing, they will have greater ability to access employment and education opportunities (including Home Forward's GOALS self-sufficiency program), and that their incomes will increase.

The average subsidy payment for HFSC households (\$891) is higher than for work focused households (\$579), several factors contribute to this difference. It is due in part to the fact that HFSC families earn less than work focused households overall and as result contribute less in tenant rent on average. It is also a function of increased costs associated with more recent lease-ups:

- Given recent implementation of this preference, the length of tenure for Homeless Family System of Care families is shorter than work focused households—an average of 1 year vs. an average of 5 years. As a result, families in the larger set of work focused households may have minimum rents increasing their rent contribution relative to HFSC families with similar incomes that haven't yet been in the program long enough to be impacted by minimum rents.
- The majority of HFSC families benefited from changes Home Forward made to increase payment standards across the County in 2016.
- The average contract rent is higher for HFSC families (\$1132 contract rent) than the average work focused household (\$1018 contract rent). This is likely the result of both the additional "shopping power" of more recent payment standards and the impact of increasing market rents.

The combination of lower incomes and tenant rents, plus higher contract rents and payment standards has led to higher subsidy payments for HFSC households. It will be interesting to see if this remains true over time as the length of tenure for these families resembles that of work focused families as a whole.

## Housing Choice

	Homeless Family System of Care HCV Preference	MTW HCV: All Tenant-Based	MTW HCV: Work Focused Tenant-Based
Downtown Portland	0%	2%	1%
NW Portland	1%	5%	1%
Gresham/Fairview/Troutdale	17%	12%	12%
Inner & Central NE	5%	11%	10%
Inner & Central SE	4%	9%	8%
N. Portland/St. Johns	5%	9%	10%
Outer NE	25%	14%	16%
Outer SE	42%	33%	38%
SW Portland	1%	5%	4%
New HCV Landlord as Pct of Lease Ups	13%	12%	6%

### *Geographic Distribution and New Landlords*

Vouchers utilized by HFSC families were concentrated in East County (84%) at a rate higher than overall voucher participants (59%) and work-focused households (67%). East County continues to be attractive to low income households because of lower rents, and families, in particular, tend to be attracted to the availability of larger units. Many of the families leasing up under this preference transitioned from locally-funded short-term assistance to the HCV; in a survey Home Forward completed of HFSC participants, 63% reported utilizing their voucher in the unit they were placed in initially by their Mobile Housing Team worker. At the time of initial placement with short-term assistance, it was not known the family would have access to long-term rent support, and as a result, the initial placement focused on affordable units then available in the market.

While the Homeless Family System of Care preference did not result in increased access to opportunity neighborhoods, it did result in new landlord participation—13% of lease-ups with the HFSC preference were with new landlords to the Housing Choice Voucher program though the

level of new landlord participation was consistent with the program as a whole-- 12% of lease-ups for the larger HCV program during the same period were with new landlords.

### **HFSC: Lessons from Implementation—Partnerships and Process**

While the strong outcomes for participants indicate that the partnership worked, connecting 200 families leaving homelessness with tenant-based vouchers proved to be both a complex and rewarding challenge for Home Forward staff and our community partners.

#### *Implementation practices to replicate*

Similar to our approach to partnerships with the Veterans Affairs Supportive Housing vouchers and the Shelter Plus Care program, we used implementation practices that we would recommend continuing in future partnerships:

- 1) Home Forward provided several trainings to MHT workers on assisting families in completing the intake process, the lease up process, methods Home Forward uses to determine unit eligibility, and beginning the subsidy payment.
- 2) Home Forward assigned one staff person to lead the lease up process and communicate with the lead MHT worker from JOIN in an effort to maximize efficiency.

#### *Implementation challenges to consider for future partnerships*

While overall everyone involved was pleased with the outcome of the project, there were some challenges and lessons learned for future partnerships:

- 1) Partners need to bring or invest in capacity and expertise in both housing placement and retention and the complexities of the HCV program. The MHT has significant experience and success with housing placement and retention utilizing low barrier, local general funds which have minimal requirements for documenting family and unit eligibility, and allow the MHT to be very nimble when working with landlords. Transitioning families from local rent assistance to the Housing Choice Voucher program was more complex, and required more MHT time and capacity than they had anticipated. The MHT's lack of familiarity with the burden and complexity of working with federal programs resulted in frustration for both the MHT and Home Forward staff. While our partners must be prepared for the reality of working within the rules of the HCV program, it is also

imperative that Home Forward continue to review its policies and procedures to decrease the administrative burden of assessing our programs where we can, including exploring options to utilize technology to be more mobile in our work with partners.

- 2) When it comes to documenting eligibility, income and unit affordability, programs focused on serving families with children and larger household sizes are inherently more complex—there are more people involved and families with children tend to be more dynamic when it comes to income and household composition. Planning efforts must account for this reality.
- 3) Partnerships like this serve a strategic purpose and support improved outcomes for our participants, but they make work for Home Forward staff more complex and difficult to manage—there are more “hands in the pot” and staff must learn to work outside of normal procedures. Investing time and energy communicating rationale (strategic importance, impact on participants) and outcome expectations to staff across the organization is critical for achieving staff support.
- 4) Providing Home Forward staff with training on the history and context of our partnerships is key, including training on the circumstances and experiences of the people the partnerships will serve. Future projects aimed at housing families exiting homelessness should consider the needs and complexities of serving families who have experienced the trauma of homelessness, including providing training to Home Forward staff on what they can expect and how they can best deliver appropriate and trauma informed service to those households.

#### *Implementation challenges unique to this partnership and timing*

- 1) With the availability of these vouchers, the HFSC increased the range of options available for working with families toward housing stability. Families were selected using a vulnerability assessment that attempted to align the long-term HCV subsidy with the families that needed it most. In some cases, this involved placing families with HCV assistance into housing directly from homelessness. In more cases, it involved transitioning families from locally-funded, Rapid Rehousing assistance to the voucher. This transition from the locally-funded Rapid Rehousing assistance resulted in some unique challenges:



- Because the MHT's locally funded assistance is intentionally low barrier, and households were placed without expectation of receiving HVC assistance, many MHT assisted families were placed in units without consideration of HCV requirements around rent reasonableness, affordability and subsidy standards.
  - The HCV program rules required that families have choice in selecting a unit. In some cases, families wanted to pursue the opportunity to move to a better unit or neighborhood with the voucher, and they expected support from the MHT. Neither Home Forward nor the MHT workers anticipated the high rate of participants wanting to move with their voucher (after being placed in a rental unit with local general funds) and so the MHT workers were unprepared to provide additional housing search support for these families.
- 2) When this collaboration began Home Forward was still participating in a MOU with the Housing Authority of Clackamas County (HACC) which allowed Home Forward voucher holders to live in either Multnomah or Clackamas County. MHT workers placed some households in Clackamas with local funding ahead of getting a voucher. A few months into the project Home Forward dissolved the MOU with HACC. Most families affected were able to port their vouchers to HACC with a reasonable accommodation due to disability or under consideration of extenuating circumstances (for example due to employment or domestic violence), but this change required additional unanticipated work from both Home Forward and MHT.

## **HOUSING CHOICE VOUCHER PREFERENCE FOR VETERANS INELIGIBLE FOR VETERANS AFFAIRS SUPPORTIVE HOUSING (VASH) VOUCHERS**

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### **VASH Ineligible Veterans: Background**

In January 2015, the Executive Committee of a Home for Everyone adopted a plan aimed to achieve the goal of ending veteran homelessness by 2016. This plan was rooted in a belief that local initiative coupled with a meaningful increase in federal supports for affordable housing can result in a system that has the capacity to ensure that when veterans in our community experience homelessness it is rare, brief and one-time.

It is unlikely any plan will prevent all veterans from ever experiencing homelessness, but the adopted plan set to create an integrated system with the ability to quickly identify veterans experiencing homelessness, offer veterans immediate “safety off the street” options while they are homeless, and move quickly to place veterans into permanent housing.

The initial plan was developed using the best available data on need in our community from the 2013 Point in Time count and the U.S. Department of Veterans Affairs (VA). Much of plan focused on the local investment and initiatives necessary to fully utilize federally funded rent assistance available through the VASH and Supportive Services for Veteran Families (SSVF) programs, but it also recognized a need for long-term housing assistance for veterans that have experienced lengthy or repeated homelessness and who are not eligible for VASH due to the length and timing of their service or the nature of their discharge. Based on the available data, we estimated there were 75 veteran households of this type, and Home Forward committed to a set-aside preference of 50 vouchers to help meet the need of this subset of veterans experiencing homelessness.

### **VASH Ineligible Veterans Preference Shared Outcome Goals**

Our MOU with Transition Projects identified these shared outcome goals:

- 1) Development of a homelessness response system for veterans with sufficient capacity and effectiveness to ensure that when veterans do experience homelessness it is brief and one-time;

- 2) Alignment of existing resources to build a comprehensive system with capacity to provide appropriate assistance to all veterans experiencing homelessness in Multnomah County;
- 3) Decrease in veterans homelessness measured through 2015 and 2017 Point in Time counts; and
- 4) Increased ability of Home Forward's HCV program to effectively target and assist veteran households exiting homelessness with long-term housing stability as measured by lease-up success, speed of lease-up and housing retention.

#### *Development of a Homelessness Response System for Veterans*

On December 9, 2016, the US Interagency Council on Homelessness (USICH) together with HUD and the VA confirmed the City of Portland and Multnomah County met their criteria and benchmarks for functionally ending veteran homelessness. The USICH's criteria and benchmarks assess the nature and impact of a community's response to veteran homelessness. Per the USICH, "the criteria and benchmarks are intended to help communities drive down the number of veterans experiencing homelessness to as close to zero as possible, while building systems that support long-term, lasting solutions that can effectively respond to future needs." These vouchers played an important role in addressing a specific gap in the system for veterans in need of housing, and were critical to our community's ability to achieve USICH certification.

A key component of a Home for Every Veteran was the creation of a Veteran By-Name List (VBNL). The VBNL is a dynamic tool used to identify and engage all veterans experiencing homelessness in the community. The list is continually updated by staff from across our veteran and homeless services systems. The VBNL has transformed our community's ability to identify and track the progress of veterans experiencing homelessness, and to coordinate services for their rapid transition into housing. Transition Projects works closely with the VA Portland Health Care System to determine each veteran's eligibility for VASH, SSVF and other local programs. Transition Projects then assigns a caseworker to all non-VASH eligible veterans and the VA works with all VASH-eligible veterans. Veterans yet to engage or enroll in an ongoing service are contacted regularly to facilitate their connection to resources. Data from the VBNL indicates that our community continues to place veterans into permanent housing at a faster pace than veterans are identified for the VBNL. It also indicates remaining unmet need for veterans ineligible for VASH—there are 46 currently on the VBNL, and some of these veterans will need access to long-term housing assistance to find housing stability.

### *Alignment of Resources*

Home Forward's HCV assistance was matched by Transition Projects<sup>3</sup> (TPI) with financial assistance with placement and retention as well as ongoing supportive services for assisted veterans. To date, Transition Projects has provided \$56,048 in financial placement and retention assistance and an additional \$50,080 in supportive services for these veterans.

### *Decrease in veterans homelessness measured through 2015 and 2017 Point in Time counts*

Our community saw a 6% increase in veterans experiencing homelessness counted in the 2017 compared to the 2015 Point in Time count. Through a Home for Every Veteran, our community has implemented significant new efforts to identify and engage all veterans experiencing homelessness in our community. This Point in Time count uptick reflects both ongoing need and these expanded efforts to identify all veterans experiencing homelessness.

### *Increased Ability of Home Forward's Housing Choice Voucher Program to Effectively Target and Assist Veterans Exiting Homelessness*

Veterans housed under this preference had a higher lease up rate (90%) than the overall tenant based voucher program (73%) and VASH (80%). Families housed under this preference leased up faster (86 days) than the overall tenant based voucher program (91 days) but slower than VASH (76 days).

## **Partnership Goals**

	<b>VASH Ineligible Veterans HCV Preference</b>	<b>MTW Housing Choice Vouchers: All Tenant-Based</b>	<b>VASH Vouchers</b>
Lease Up Success Rate	90%	73%	80%
Voucher to Lease Up (Time)	86 days	91 days	76 days
Housing Retention at 12 months (Percent)	95%	91%	89%

## **VASH Ineligible Veterans Households Served**

Home Forward began accepting referrals for the preference during the summer of 2015, and the lease up of the program concluded in Summer 2016. The table shows data on race and ethnicity for the VASH ineligible veterans' preference alongside data from Home Forward's HCV program, Home Forward's VASH program and the 2017 Point in Time count of homelessness

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<sup>3</sup> Transition Projects is a local homeless services provider that has extensive Veteran Services programming.  
<http://www.tprojects.org/veteran-services/>

(PIT). These data sets are not strictly comparable, but using other data sets as reference can be illustrative.

## Demographics

	VASH Ineligible Veterans Preference	MTW Housing Choice Vouchers: All Tenant-Based	VASH	Veterans Experiencing Homelessness: 2017 Point In Time Count	People in Poverty: Multnomah County
<b>Race/Ethnicity</b>					
People of Color	28%	59%	26%	35%	45%
White Alone, Not Hispanic/Latino	72%	41%	74%	65%	55%
<b>Race Alone or in Combination</b>					
African American/Black	27%	47%	20%	14%	14%
Asian	0%	6%	1%	1%	8%
Hawaiian or Other Pacific Islander	2%	2%	1%	1%	2%
Native American/Alaskan Native	7%	4%	4%	12%	4%
Hispanic/Latino	3%	10%	5%	7%	20%
White	73%	49%	79%	75%	71%

Demographics for the VASH ineligible veteran households largely mirror those of VASH households, but both programs serve a smaller proportion of veterans of color than identified in the 2017 Point in Time Count of Homelessness, particularly amongst Native American and Hispanic/Latino veterans. This is an area for continuing analysis in A Home for Every Veteran.

## Family Characteristics

	VASH Ineligible Veterans HCV Preference	MTW Housing Choice Vouchers: All Tenant-Based	VASH Vouchers
<b>Families with Children</b>	8%	37%	5%
<b>Families headed by Senior</b>	36%	44%	32%
<b>Families headed by person with a Disability</b>	53%	51%	54%
<b>Average Household Size</b>	1.14	2.28	1.28
<b>Average Household Income</b>	\$587	\$1,089	\$968
<b>Average Monthly Rent</b>	\$800	\$854	\$872
<b>Average HAP</b>	\$712	\$516	\$709
<b>Average Tenant Rent Payment</b>	\$143	\$338	\$249

*Family Income and Subsidy Costs*

Household size and composition largely mirrors the VASH program. Incomes for veterans served through this preference are considerably lower than those in the VASH program; this is most likely attributed to a correlation between VASH eligibility and other veteran benefits. While the average contract rent was more for VASH participants (\$800 versus \$872 for VASH) the average subsidy payment was comparable (\$712 versus \$709 for VASH). This is due to the higher tenant rent payments for VASH participants associated with higher incomes.

## Housing Choice

	VASH Ineligible Veterans HCV Preference	MTW HCV: All Tenant-Based	VASH Vouchers
Downtown Portland	6%	2%	9%
NW Portland	22%	5%	14%
Gresham/Fairview/Troutdale	4%	12%	8%
Inner & Central NE	20%	11%	13%
Inner & Central SE	3%	9%	10%
N. Portland/St. Johns	6%	9%	7%
Outer NE	3%	14%	7%
Outer SE	14%	33%	20%
SW Portland	22%	5%	13%
New HCV Landlord as Pct of Lease Ups	5%	12%	7%

### *Geographic Distribution and New Landlords*

The majority (64%) of the vouchers utilized under this preference were used in areas with higher rents and payment standards: NW Portland, Inner/Central NE and, SW Portland. This is relatively similar to VASH and can be attributed, in part, to the adequate availability of smaller units in attractive neighbors where we have raised our payment standards. These veterans were also more likely to lease-up with landlords that have experience with our HCV program—5% were with landlords new to the HCV program.

### **VASH Ineligible Veterans: Lessons from Implementation—Partnerships and Process**

The partnership between Home Forward and Transition Projects to lease up 50 veterans ineligible for the VASH program was efficient, encouraging, and successful. Home Forward staff attribute the efficient lease up of 50 households over 12 months to streamlined

communication between the agencies and a shared commitment to end veteran homelessness in our community.

*Implementation practices to replicate*

Similar to our approach to partnerships with the Veterans Affairs Supportive Housing vouchers and the Shelter Plus Care program, we used implementation practices that we would recommend continuing in future partnerships:

- 1) Home Forward provided several trainings to TPI workers on assisting families in completing the intake process, the lease up process, methods Home Forward uses to determine unit eligibility, and getting the subsidy payment started.
- 2) Home Forward assigned one staff person to lead the lease up and communicate with Transition Projects in an effort to maximize efficiency.

During a post-survey of the program Transition Projects' staff were overwhelming positive about both the trainings they received from Home Forward related to utilizing Housing Choice Vouchers, and the overall partnership and process. Transition Projects' Veterans Services program has significant experience assisting veterans using complex, federally funded resources including the SSVF and Grant Per Diem programs. While staff from TPI required training on the specifics of the HCV program, they had comfort with the rigor required to meet documentation standards and program compliance needs for federally funded housing programs.

## **HOME FORWARD'S "A HOME FOR EVERYONE" HOUSING CHOICE VOUCHER SET-ASIDE PREFERENCES: CONCLUSION**

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Home Forward's HCV preferences dedicated to the lease up of families and veterans leaving homelessness were successful on several fronts, and they were encouraging for the staff who worked on implementation. Home Forward's use of voucher set-asides to respond to the needs of our community represents an intentional deployment of our resources in concert with our strategic plan and our engagement with system level partners. Consideration of how to build on these early successes will be important as the Board of Commissioners develops an agency housing strategy that also recognizes current commitments and the significant and varied calls on constrained Housing Choice Voucher resources.



# STAFF REPORTS

**Procurement & Contracts Department**  
**MONTHLY CONTRACT REPORT**  
**Contracts Approved 03/01/20 - 04/30/20**

PUBLIC IMPROVEMENT  
(CONSTRUCTION & MAINTENANCE SERVICES)

Contract #	Amend #	Contractor	Contract Amount	Description	Dept.	Execution Date	Expiration Date
C2455	0	Walsh Construction Co.	\$ 432,441.00	Emergency shower repair at BCC.	DCR	3/9/2020	7/31/2020
C2487	0	Hood to Coast Restoration	\$ 3,210.00	Install mounting blocks at siding at Lexington Apartments for radon mitigation	DCR	3/18/2020	12/31/2020
C2317	0	Cascade Radon Inc.	\$ 1,745.00	Additional radon mitigation at Madrona Place	DCR	3/20/2020	12/31/2020
C2504	0	Anytime Plumbing & Drain Cleaning Services	\$ 25,000.00	Excavation and sewer pipe repair at Townhouse Terrace and Peaceful Villa	Property Management	4/8/2020	7/31/2020
C2510	0	KO Construction	\$ 28,608.00	Install mounting blocks at siding at Rockwood Station (for radon mitigation)	DCR	4/9/2020	12/31/2020
C2503	0	In Your Home	\$ 4,614.00	Install ADA ramp at Peaceful Villa	Property Management	4/28/2020	5/6/2020
<b>Subtotal</b>			<b>\$ 495,618.00</b>				<b>6</b>

GOODS & SERVICES

Contract #	Amend #	Contractor	Contract Amount	Description	Dept.	Execution Date	Expiration Date
C2470	0	PG Long Floorcovering LLC	\$ 465.41	Carpet replacement in unit at Madrona	Property Management	3/3/2020	3/13/2020
C2477	0	Environmental Works	\$ 8,875.00	Radon mitigation at Peaceful Villa	DCR	3/3/2020	12/31/2020
C2478	0	Diana's Cleaning Professional Services	\$ 7,800.00	Sanitizing surfaces twice daily at NMW	IFSS	3/4/2020	6/4/2020
C2485	0	Universal Lawncare Maintenance	\$ 9,000.00	Landscaping at HWE	Property Management	3/10/2020	3/31/2021
C2486	0	Environmental Works	\$ 6,275.00	Radon mitigation at Chateau	DCR	3/12/2020	12/31/2020

C2464	0	Converjint Technologies	\$ 7,764.00	Electronic security system services at SCC	Property Management	3/17/2020	2/9/2022
C2494	0	Environmental Works	\$ 9,340.00	Radon mitigation at Ruth Haefner	DCR	3/18/2020	12/31/2020
C2492	0	Diana's Cleaning Professional Services	\$ 150,000.00	On-Call Cleaning Services for vacant units and common area/office cleaning	Property Management	3/21/2020	3/18/2023
C2490	0	Sensational Cleaning Solutions	\$ 150,000.00	On-Call Cleaning Services for vacant units and common area/office cleaning	Property Management	3/23/2020	3/18/2023
C2491	0	Carbonell Cleaning Solutions	\$ 150,000.00	On-Call Cleaning Services for vacant units and common area/office cleaning	Property Management	3/23/2020	3/18/2023
C2496	0	American Heating	\$ 4,640.00	HVAC maintenance at HWE	Property Management	3/23/2020	12/31/2020
C2489	0	G&L Janitorial	\$ 150,000.00	On-Call Cleaning Services for vacant units and common area/office cleaning	Property Management	3/24/2020	3/18/2023
C2493	0	Jani-King	\$ 150,000.00	On-Call Cleaning Services for vacant units and common area/office cleaning	Property Management	3/26/2020	3/18/2023
C2498	0	Kimberly Kent	\$ 19,000.00	Commissioning an art broker to select, frame, and install artwork for Schunk Tower.. Includes installation so entire contract is G&S per CEK	DCR	4/1/2020	12/31/2020
C2452	0	ValleyScapes Landscape Solutions	\$ 36,644.00	Landscaping at Peaceful Villa, Lexington Court, Cora Park, Chateau, and scattered sites	Property Management	4/7/2020	4/5/2021
C2499	0	Universal Lawn Care Maintenance	\$ 150,000.00	On-Call Outdoor Maintenance Services	Property Management	4/8/2020	4/5/2023
C2509	0	Cascade Radon Inc.	\$ 99,185.00	Amending to remove clause about prevailing wage	DCR	4/10/2020	12/31/2020
C2500	0	ValleyScapes Landscape Solutions	\$ 150,000.00	On-Call Outdoor Maintenance Services	Property Management	4/11/2020	4/5/2023
C2502	0	Snugs Services	\$ 150,000.00	On-Call Outdoor Maintenance Services	Property Management	4/14/2020	4/5/2023
C2512	0	Eclipse Security Service	\$ 4,000.00	Security services at Celilo Court	Prop Mgmt	4/15/2020	12/23/2020
C2518	0	Great Northwest Environmental	\$ 9,540.00	Asbestos abatement at Fountain Place	DCR	4/24/2020	12/31/2020
<b>Subtotal</b>			<b>\$ 1,422,528.41</b>				<b>21</b>

PERSONAL SERVICE CONTRACTS

Contract #	Amend #	Contractor	Contract Amount	Description	Dept.	Execution Date	Expiration Date
C2475	0	Wayne Scott	\$ 6,000.00	Trauma-informed care training	Talent & Organizational Development	3/2/2020	12/30/2020
C2437	0	City of Portland	\$ 274,355.00	IGA for services related to Home Forwards Equity program, workforce, and section 3	Procurement	3/3/2020	12/31/2024
C2480	0	Lifeworks NW	\$ 58,476.00	Resident services coordinator at Beech Street; Rule 46-0340	Community Services	3/6/2020	12/31/2020
C2483	0	CSG Advisors, Inc.	\$ 30,000.00	TOA strategy and phasing for Groups 7 & 8	DCR	3/6/2020	12/31/2021
C2482	0	Bremik Construction	\$ 10,895.00	Application Phase for Baldwin	DCR	3/9/2020	5/31/2020
C2495	0	Art by Cedar	\$ 13,070.00	Art at Williams Plaza	DCR	3/18/2020	9/30/2020
C2481	0	Impact Northwest	\$ 222,587.00	Case management for CHSP; Rule 46-0340	Community Services	3/30/2020	12/31/2020
C2497	0	Ella Marra-Ketelaar	\$ 5,550.00	Community engagement services at Schunk	DCR	3/30/2020	12/31/2020
C2517	0	Doug Decker LLC	\$ 9,650.00	History project for Dekum Redevelopment and PCC/Killingsworth Project	DCR	4/28/2020	12/30/2020
<b>Subtotal</b>			<b>\$ 630,583.00</b>				<b>9</b>

PROFESSIONAL SERVICE CONTRACTS (A&E)

Contract #	Amend #	Contractor	Contract Amount	Description	Dept.	Execution Date	Expiration Date
C2445	0	Lever Architects	\$ 54,600.00	Dekum A&E Masterplan Phase	DCR	3/26/2020	9/30/2020
C2462	0	SERA Architect and Design Services	\$ 52,500.00	Application phase for Baldwin project	DCR	4/22/2020	7/15/2020
<b>Total</b>			<b>\$ 107,100.00</b>				<b>2</b>

AMENDMENTS TO EXISTING CONTRACTS

Contract #	Amend #	Contractor	Contract Amount	Description	Dept.	Execution Date	Expiration Date
C1952	5	Universal Lawncare Maintenance	\$ 60,000.00	Landscaping Maintenance for 20 Master-Leased Properties; amended to extend contract	Asset Mgmt	3/3/2020	3/31/2021
C1602	3	Verbio (aka Oregon Translation)	\$ 23,000.00	On-Call Interpreter and Translation Services for the Agency; amended to extend contract and add funds	Prop Mgmt	3/4/2020	8/1/2020
C2227	2	Otis Elevator	\$ 41,410.50	Additional electrical, added fencing, expedited schedule, CAT	DCR	3/4/2020	8/18/2020
C1940	17	MWA Architects Inc	\$ 11,530.00	Additional scope for roof of Maple Mallory	DCR	3/6/2020	8/31/2020
C2255	3	Walsh Construction Co.	\$ (2,376.00)	Amount of CAT tax on amendment #2 was too high, deducting the difference	DCR	3/6/2020	1/31/2022
C2291	1	Metro Access Controls	\$ 488.00	Relocate DSX panel at Schrunk; amended scope	DCR	3/6/2020	3/31/2020
C2428	1	R&W Engineering	\$ -	Mechanical and electrical engineering services at Headwaters; amended to add time	DCR	3/9/2020	5/31/2020
C2229	1	ACC Cost Consultants LLC	\$ 25,278.00	Additional cost estimating services for Powell	DCR	3/10/2020	12/31/2020
C2353	1	WDY	\$ 7,500.00	Structural engineering services at Headwaters apartments	DCR	3/11/2020	6/15/2020
C2372	2	Environmental Works	\$ 150.00	Additional radon testing at Gallagher Plaza	DCR	3/11/2020	12/31/2020
C2457	1	Forensic Building Consultants	\$ 17,480.00	Additional construction admin work for Group 6-2 (hunters run, tillicum south, tillicum north)	DCR	3/11/2020	12/31/2020
C2190	2	Apex Companies LLC	\$ -	Geotechnical services at fountain place; amended to add time	DCR	3/12/2020	8/30/2020
C2327	1	LMC, Inc.	\$ 959,598.00	Design phase for Group 7	DCR	3/12/2020	12/31/2022
C2344	2	KO Construction	\$ 3,464.00	Additional mounting block installations at Carlton Court & Eastwood Court	DCR	3/12/2020	12/31/2020
C2433	1	Epic Land Solutions	\$ 12,493.75	Resident relocation at Powellhurst Woods; amended scope	DCR	3/12/2020	8/30/2020
C2434	1	Epic Land Solutions	\$ 12,456.25	Resident relocation at Alderwood; amended scope	DCR	3/12/2020	9/30/2020
C1964	13	LMC, Inc.	\$ 3,388.86	Schrunk Tower Development; scope change	DCR	3/13/2020	3/16/2020

C2299	6	Robert Half International	\$ 10,716.00	Temp position: A/R specialist; extend duration	FAAM	3/13/2020	3/13/2020
C2126	12	LMC, Inc.	\$ 67,008.54	Schrunk Tower maintenance, CO, misc changes	DCR	3/16/2020	3/16/2020
C1968	19	Walsh Construction Co.	\$ 96,736.00	Medallion CO #7	DCR	3/17/2020	10/30/2020
C1968	20	Walsh Construction Co.	\$ 397,165.00	Williams CO #7	DCR	3/17/2020	10/30/2020
C1940	18	MWA Architects Inc	\$ 1,520.00	Additional scope for leveling area near generator at Schrunk Tower	DCR	3/19/2020	8/31/2020
C2340	2	MWA Architects	\$ 1,540.13	amending scope at Richmond Place to include RDH as envelope consultant	DCR	3/19/2020	7/31/2020
C2160	2	NW Enforcement	\$ -	Establishing expectations for on-call engagement	Property Management	3/20/2020	12/31/2020
C2315	2	Cascade Radon Inc.	\$ 970.00	Additional radon mitigation at Stark Manor	DCR	3/20/2020	12/31/2020
C2320	2	Cascade Radon Inc.	\$ 12,895.00	Additional radon mitigation at Eastwood Court	DCR	3/23/2020	12/31/2020
C2343	1	Kings Service	\$ 800.00	Amending scope at Cascadia condos, including pressure washing	DCR	3/23/2020	4/30/2020
C1719	28	O'Neill/Walsh Community Builders	\$ 10,488.00	GMP Amendment CO #27 - grand avenue apartments	DCR	3/25/2020	5/22/2020
C2092	6	Lorentz Bruun Construction	\$ 13,899,995.00	Fountain place construction GMP amendment	DCR	3/25/2020	9/30/2021
C2098	3	Hedgehog Tree Care Inc.	\$ -	Create tree protection plans for Hunters Run, Alderwood, Floresta, and Powellhurst Woods; amended to add time	DCR	3/26/2020	9/30/2020
C2416	1	Forensic Building Consultants	\$ 3,750.00	Design brief at Kelly Place	DCR	3/30/2020	1/2/2022
C2417	1	Forensic Building Consultants	\$ 3,750.00	Design brief at Schiller Way	DCR	3/30/2020	1/2/2022
C1961	7	Performance Systems Integration (PSI)	\$ 3,595.50	Fire safety services at 14 properties; amended to add 5 year pipe inspection, 5 year valve inspection, and replacing water gauges	Property Management	4/7/2020	12/3/2020
C2496	1	American Heating, Inc	\$ 485.00	HVAC maintenance at SCC; amended scope	Property Management	4/8/2020	12/31/2020
C1964	14	LMC, Inc.	\$ 5,907.64	Schrunk Tower Development; scope change	DCR	4/13/2020	7/31/2020
C1968	22	Walsh Construction Co.	\$ 17,602.00	Medallion CO #8	DCR	4/13/2020	10/30/2020

C2368	2	Buffalo Welding	\$ -	extend the railings around the perimeter of the Northwest Tower Annex Roof	DCR	4/14/2020	5/15/2020
C2403	1	Snugs Services	\$ -	On-call snow removal services	Prop Mgmt	4/14/2020	3/31/2021
C1791	3	Northwest Pest Control	\$ -	On-call bed bug heat treatment; amended to add time	Prop Mgmt	4/16/2020	11/28/2021
C1968	21	Walsh Construction Co.	\$ 175,361.00	Williams CO #8	DCR	4/20/2020	10/30/2020
C2315	3	Cascade Radon Inc.	\$ 33,707.00	Additional radon mitigation at Stark Manor	DCR	4/21/2020	12/31/2020
C2509	1	Cascade Radon Inc.	\$ -	Amending to remove clause about prevailing wage	DCR	4/22/2020	12/31/2020
C2109	2	Holst Architecture	\$ 466,082.00	Additional Schematic Design work at Powell	DCR	4/23/2020	12/31/2023
C2109	3	Holst Architecture	\$ 2,319,491.00	Design Development thru Construction Administration amendment for A&E at Powell	DCR	4/23/2020	12/31/2023
C1961	8	Performance Systems Integration (PSI)	\$ 12,483.00	Fire safety services at 14 properties; amended scope for HWE	Property Management	4/24/2020	12/3/2020
C2402	1	Lorentz Bruun Construction	\$ -	Emergency truss repair in unit #417 & #414 at Headwaters; amended to add time	DCR	4/29/2020	5/31/2020
C2046	2	NW Enforcement	\$ 24,251.20	Security Services for Schunk; amended scope	Property Management	4/30/2020	6/14/2020
<b>Subtotal</b>			<b>\$ 18,742,160.37</b>				<b>47</b>

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

Contract #	Amend #	Contractor	Contract Amount	Description	Dept.	Execution Date	Expiration Date
GO2488	0	Elevate Energy	\$ 20,700.00	Energy and water use assessment at Fairfield	DCR	3/19/2020	12/31/2022
<b>Subtotal</b>			<b>\$ 20,700.00</b>				<b>1</b>
<b>Total</b>			<b>\$ 21,418,689.78</b>				<b>86</b>

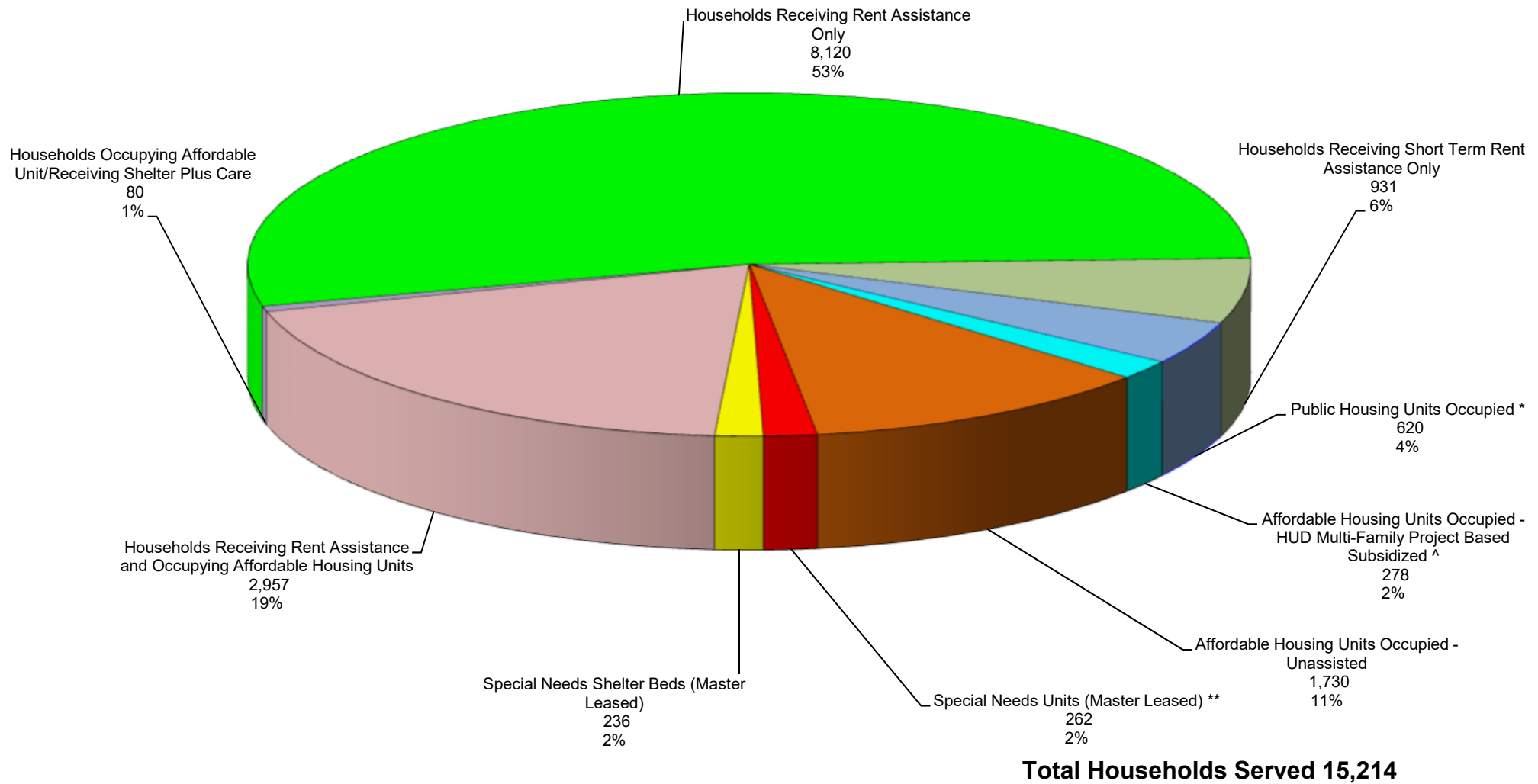
**Procurement & Contracts Department  
FUTURE FORMAL PROCUREMENTS  
6 Month Look Ahead - May 2020**

Estimated Contract Amount	Description	Dept.	Solicitation Period
\$600,000	Window replacement at Gretchen Kafoury	DCR	Re-Bid Postponed TBD
\$24 million	CM/GC - Killingsworth Housing	DCR	In Progress
Approx. \$1.5 million	CHSP	Community Services	Aug/Sept
\$16 million	A&E - Troutdale	DCR	Sept/Oct
\$11 million	A&E - Fairfield	DCR	August
\$16 million	CM/GC - Fairfield	DCR	September



# HOUSEHOLDS SERVED REPORT

## Total Households Served: Rent Assistance and Occupied Housing Units April 2020



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

\* Includes Local Blended Subsidy

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

# Households Served

## Households Served Through Housing Supports April 2020

Rent Assistance	All Programs	Moving to Work Programs	Non-MTW Programs
Rent Assistance Vouchers - Home Forward Funded	11,077	7,679	1,722
Tenant Based Vouchers	5,385	5,385	
Project Based Vouchers	1,651	1,651	
Hi Rise Project Based Vouchers	643	643	
RAD Project Based Vouchers	1,307		
Section 18 Project Based Vouchers	369		
Single Room Occupancy (SRO)/MODS	130		130
Family Unification Program	175		175
Mainstream Vouchers	53		53
Veterans Affairs Supportive Housing (VASH)	619		619
Rent Assistance - PORT IN From Other Jurisdiction	745		745
Short Term Rent Assistance Programs	1,011	60	951
Shelter + Care	476		476
Locally Funded Short Term Rent Assistance	475		475
Earl Boyles	17	17	
MIF Funded Short Term Rent Assistance	-	-	
Alder School	27	27	
New Doors	7	7	
Employment Opportunity Program	9	9	
Work Systems Inc. - Agency Based Rent Assistance	-	-	
<b>Total Rent Assistance</b>	<b>12,088</b>	<b>7,739</b>	<b>2,673</b>
<b>Subsidized Housing Units</b>			
<b>Public Housing Units Occupied</b>	<b>620</b>	<b>620</b>	<b>-</b>
Traditional Public Housing units Occupied	620	620	
Affordable Housing Units Occupied (excluding PH subsidized)	5,045		4,676
Affordable Housing Units - Tenant Based Vouchers	300		300
Affordable Housing Units - Shelter + Care	80		80
Affordable Housing Units - Project Based Vouchers	-		-
Affordable Housing Units - Hi Rise Project Based Vouchers	643		643
Affordable Housing Units - RAD Project Based Vouchers	1,307		1,307
Affordable Housing Units Section 18 Project Based Vouchers	369		
Affordable Housing Units - HUD Multi-Family Project Based	278		278
Affordable Housing Units - VASH Vouchers	285		285
Affordable Housing Units - Family Unification Program	6		6
Affordable Housing Units - Section 8 Port In	47		47
Affordable Housing Units - Unassisted	1,730		1,730
Special Needs	498		498
Special Needs Units (Master Leased) **	262		262
Special Needs Shelter Beds (Master Leased)	236		236
<b>Total Households Occupying Housing Units</b>	<b>6,163</b>	<b>620</b>	<b>5,174</b>
<b>Total Housing Supports Provided to Household</b>	<b>18,251</b>	<b>8,359</b>	<b>7,847</b>
Household Occupying Affordable Unit/Receiving Home Forward Rent Assistance	(2,957)		(2,957)
Households Occupying Affordable Unit/Receiving Shelter Plus Care	(80)		(80)
<b>Total Households Served</b>	<b>15,214</b>	<b>8,359</b>	<b>4,810</b>

### Notes:

- <sup>A</sup> Consists of Grace Peck Terrace, Multnomah Manor, Plaza Townhomes, Rosenbaum Plaza, Unthank Plaza
- <sup>\*\*</sup> Special Needs are physical units as occupancy levels that are not reported to Home Forward by service providers master leasing these properties.

# DASHBOARD REPORT

# Home Forward - Dashboard Report For April of 2020

## Property Performance Measures

### Occupancy

	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	Total
Public Housing	17	645	629	9	98.6%	8	323	186	122	6	0	645
Affordable Owned	27	2,481	2,398	94	96.1%	929	719	621	182	30	0	2,481
Tax Credit Partnerships *	35	2,863	2,790	49	98.2%	807	952	563	386	138	17	2,863
<b>Total Affordable Housing</b>	<b>62</b>	<b>5,344</b>	<b>5,188</b>	<b>143</b>	<b>97.2%</b>	<b>1,736</b>	<b>1,671</b>	<b>1,184</b>	<b>568</b>	<b>168</b>	<b>17</b>	<b>5,344</b>
<b>Combined Total PH and AH</b>	<b>79</b>	<b>5,989</b>	<b>5,817</b>	<b>152</b>	<b>97.4%</b>	<b>1,834</b>	<b>2,098</b>	<b>1,406</b>	<b>690</b>	<b>174</b>	<b>17</b>	<b>6,219</b>
Special Needs (Master Leased)	27	262	262									
Special Needs (Shelter Beds)	3	236	236									
<b>Total with Special Needs</b>	<b>109</b>	<b>6,487</b>	<b>6,315</b>									

\* Excludes Louisa Flowers- has not fully leased yet

### Financial

	Fiscal YTD ending 12/31/19				12/31/19		
	# of Properties/units Positive Net Operating Income (NOI)	# of Properties/units Negative Net Operating Income (NOI)	# of Properties/units Under Construction (NOI Does not Apply)		# of Properties meeting Debt Coverage	# of Properties not meeting DCR	# of Properties DCR Not Applicable
Public Housing	17	645	0	0			
Affordable Owned	27	2,481	0	0	16	5	6
Tax Credit Partnerships	30	2,434	4	429	1	240	19

### 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	126	20.4%	2.6	2.0	42.7%	57.0%	0.9%	6.1%	61.8%	4.6%	0.9%	3.6%	20.0%	3.0%
11 to 20%	256	41.4%	1.6	1.4	79.8%	20.0%	16.0%	21.1%	68.8%	2.8%	4.7%	0.8%	11.1%	4.3%
21 to 30%	127	20.6%	1.9	1.6	75.4%	25.0%	7.0%	5.4%	69.8%	2.4%	6.4%	0.8%	20.6%	3.9%
31 to 50%	83	13.4%	2.8	2.1	48.9%	51.0%	3.0%	2.5%	71.3%	1.1%	4.3%	1.1%	22.3%	3.6%
51 to 80%	23	3.7%	2.6	2.3	57.7%	42.0%	0.5%	0.9%	61.5%	3.9%	7.7%		23.1%	0.7%
Over 80%	3	0.5%	4.0	2.7	66.7%	33.0%	0.2%	0.1%	33.3%		33.3%			0.0%
All	618	100%	2.6	2.0	63.7%	36.3%	27.6%	36.1%	37.5%	49.0%	1.8%	5.0%	0.7%	6.6%

### Waiting List

0 to 10% MFI	4,206	40.5%	6.1	1.3			1.6%	12.1%	12.5%	18.9%	1.9%	0.9%	0.5%	2.0%
11 to 20%	3,076	27.9%	1.9	1.3			3.6%	13.7%	8.5%	13.9%	1.2%	1.1%	2.3%	0.4%
21 to 30%	1,572	15.4%	2.3	1.3			2.1%	4.9%	4.6%	7.6%	0.5%	0.7%	1.5%	0.3%
31 to 50%	966	12.2%	2.5	1.2			1.2%	2.2%	3.9%	5.3%	0.4%	0.7%	1.6%	0.1%
51 to 80%	234	3.0%	2.5	1.2			0.2%	0.4%	1.1%	1.1%	0.1%	0.2%	0.1%	0.0%
Over 80%	93	0.9%	2.4	1.1			0.1%	0.2%	0.4%	0.3%	0.0%	0.0%	0.1%	0.0%
All	10,147	100.0%	3.0	1.4			44.0%	10.0%	31.0%	47.1%	4.2%	3.9%	1.5%	10.0%

### Other Activity

Public Housing	
Names pulled from Wait List	162
Denials	2
New rentals	4
Vacates	4
Evictions	0
# of work orders received	1,335
# of work orders completed	1,085
Average days to respond	25.9
# of work orders emergency	159
Average response hrs (emergency)	0

## 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 Leased	Vouchers Terminated
Tenant Based Vouchers	6,071	5,385	89%	\$832	-259,646	2,500	0	19	12	403	89%	\$840	-382,253	35	32
Project Based Vouchers	2,771	2,663	96%	\$813	-442			17	15	100	96%	\$817	16,388	59	34
VASH Vouchers	855	619	72%	\$758	-103,312			5	5	40	72%	\$756	-209,789	6	10
FUP Vouchers	188	175	93%	\$875	-20,674			2	0	16	91%	\$868	-48,922	9	0
Mainstream Vouchers	99	53	54%	\$889	-24,462			4	0	9	51%	\$471	-96,052	10	0
RAD Project Based Vouchers	1,419	1,307	92%	\$433	-213,099			11	6	76	92%	\$217	-992,711	25	15
SRO/MOD Vouchers	130	130	100%	\$469	705			1	1	39	100%	\$479	3,493	3	2
All Vouchers	11,533	10,332	90%	\$769	-620,930			59	39	683	90%	\$745	-1,709,846	147	93

# Home Forward - Dashboard Report For April of 2020

## 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	Black African American	White	Native American	Asian	Hawaiian/ Pacific Islnd	Hispanic/ Latino
Tenant Based Voucher Participants *														
0 to 10% MFI	1,137	18.2%	1.7	1.8	31.0%	8.4%	0.8%	4.5%	39.2%	47.1%	3.7%	1.7%	0.1%	2.2%
11 to 20%	2,446	39.3%	2.1	2.0	14.6%	7.7%	15.5%	17.1%	34.6%	53.8%	1.8%	6.7%	0.2%	1.3%
21 to 30%	1,367	21.9%	2.8	2.3	7.5%	10.1%	8.7%	6.7%	31.5%	58.6%	1.2%	4.6%	0.1%	1.3%
31 to 50%	1,008	16.2%	2.9	2.6	1.7%	2.7%	3.0%	3.6%	41.6%	47.7%	2.2%	3.6%	0.0%	0.2%
51 to 80%	257	4.1%	3.1	2.7	0.1%	0.1%	0.3%	0.4%	52.6%	37.5%	1.5%	4.0%	0.0%	0.0%
Over 80%	17	0.3%	2.3	2.2	82.4%	18.0%	0.0%	0.1%	46.7%	40.0%	5.9%			5.9%
All	6,231	100%	2.5	2.3	64%	36%	28%	32.2%	36.6%	51.9%	2.1%	4.7%	0.1%	1.3%

\* (Includes Tenant Based, FUP, VASH, Mainstream and Port In Vouchers)

## Project Based Voucher Participants

	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	Black African American	White	Native American	Asian	Hawaiian/ Pacific Islnd	Hispanic/ Latino
0 to 10% MFI	1085	27.3%	2.0	1.5	14.5%	5.5%	1.3%	8.6%	22.6%	65.2%	3.9%	1.7%	1.5%	1.6%
11 to 20%	1701	42.9%	3.4	2.3	4.3%	6.3%	14.7%	20.8%	23.5%	65.5%	3.8%	3.3%	0.7%	2.3%
21 to 30%	698	17.6%	3.0	2.3	0.7%	0.9%	8.1%	5.1%	21.9%	67.6%	2.6%	3.0%	1.0%	0.1%
31 to 50%	380	9.6%	3.4	2.7	0.2%	0.2%	2.4%	1.5%	28.7%	60.1%	3.2%	2.1%	1.3%	0.1%
51 to 80%	91	2.3%	3.6	2.7	0.2%	0.3%	0.1%	0.0%	32.2%	57.8%	6.7%	1.1%	1.1%	0.2%
Over 80%	17	0.4%	3.9	2.8	42.9%	57.0%	0.1%	0.0%	20.0%	73.3%	6.7%			42.9%
All	3,973	100%	3.2	2.4	72%	28%	48%	12.3%	23.6%	65.1%	3.6%	2.6%	1.0%	1.6%

## Waiting List

	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	Black African American	White	Native American	Asian	Hawaiian/ Pacific Islnd	Hispanic/ Latino	
0 to 10% MFI	721	33.4%	2.5				3.2%	26.3%	30.3%	53.6%	4.8%	2.1%	1.2%	7.0%	1.2%
11 to 20%	622	28.3%	1.8				15.2%	61.2%	28.4%	56.6%	3.1%	5.4%	1.0%	4.6%	1.1%
21 to 30%	426	18.7%	2.1				17.6%	38.7%	23.7%	63.0%	2.4%	3.8%	1.0%	5.3%	0.9%
31 to 50%	365	16.1%	2.4				12.5%	24.2%	27.7%	57.6%	2.8%	4.8%	1.2%	5.5%	0.4%
51 to 80%	61	2.8%	2.6				9.2%	17.2%	39.1%	43.7%	1.2%	3.5%	1.2%	10.3%	1.2%
Over 80%	15	0.7%	2.5				9.1%	27.3%	45.5%	36.4%	4.6%		9.1%	4.6%	0.0%
All	2,210	100.0%	2.3				11.0%	38.0%	28.5%	56.3%	3.5%	3.8%	0.8%	5.8%	1.0%

## Short Term Rent Assistance

	# of Households Participating	\$ Amount of Assistance Provided	Average Cost per Household
Shelter Plus Care	481	\$450,267	936
Short Term Rent Assistance	535	\$450,233	842

## Resident Services

### Resident Programs

	Housing Program Served	Households Served/	Monthly Funding Amount	Average Funds per Participant
Congregate Housing Services * as of previous month	Public Housing	146	\$80,273	\$549.81

Resident Services Coordination	Public Housing								
		# Services	# of Programs	# Event Attendees	# Notice/Violation Meetings	# Eviction Notices	# Housing Stability Meetings		
		804	6	85	79	3	120		
		# of Participants	Escrow \$ Held	New Enrollees	# of Graduates	Escrow \$ Disbursed	Terminations or Exits	Escrow \$ Forfeited	Avg Annual Earned Income Increase Over Last Year
Nine months ending 12/31/2018	Public Housing	388	\$1,430,846	2	1	\$24,120	1	\$0	\$1,812
Twelve months ending 3/31/2019	Section 8	400	\$1,394,613	5	1	\$30,649	2	\$1,375	\$2,617

**Agency** Nine months ending 12/31/2019

The below data represents unaudited financial data.

	Fiscal Year to Date	Prior YTD	Increase (Decrease)
Subsidy Revenue	\$21,526,891	\$21,466,295	\$60,596
Grant Revenue	116,357,630	107,752,491	8,605,139
Property Related Income	210,952,330	159,545,118	51,407,212
Development Fee Revenue	9,282,334	9,082,944	199,390
Other Revenue	29,356,739	14,189,238	15,167,501
<b>Total Revenue</b>	<b>\$387,475,924</b>	<b>\$312,036,086</b>	<b>\$75,439,837</b>
Housing Assistance Payments	272,034,014	273,180,532	-1,146,519
Operating Expense	69,257,245	81,476,154	-12,218,909
Depreciation	4,645,607	4,930,167	-284,560
<b>Total Operating Expenses</b>	<b>345,936,867</b>	<b>359,586,853</b>	<b>-13,649,987</b>
<b>Operating Income</b>	<b>\$41,539,057</b>	<b>-\$47,550,767</b>	<b>\$89,089,824</b>
Other Income(Expense)	11,246,017	35,743,363	-24,497,346
Capital Contributions	-11,070	11,941	-23,011
Increase(Decrease) Net Assets	<b>52,774,004</b>	<b>-11,795,463</b>	<b>64,569,467</b>
Total Assets	<b>\$ 580,605,352</b>	<b>\$ 515,815,685</b>	<b>\$ 64,789,667</b>
Liquidity Reserves	33,530,304	29,928,641	3,601,663

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

	Units	Construction Start	Construction End	Current Phase	Total Cost	Cost Per Unit
Lloyd Housing	240	17-Dec	19-Nov	Post-Construction	\$74,112,444	\$308,802
North Group Rehab Project	350	18-Dec	20-Jun	Construction	\$101,323,805	\$289,496
East Group Rehab Project	315	19-Jun	20-Dec	Construction	\$78,925,247	\$253,731
Fountain Place Rehab Project	74	20-Mar	21-Dec	Construction	\$32,804,443	\$443,303

**Capital Improvement**

Gretchen Kafoury Windows Replacem	N/A	20-Apr	20-Jul	Pre-Construction	\$550,000	N/A
Schiller Way Elevated Deck Project	N/A	20-Jun	20-Aug	Pre-Construction	\$384,000	N/A
Kelly Place Elevated Deck	N/A	20-Jun	20-Sep	Pre-Construction	\$320,000	N/A