



**Portland
Housing Bureau**

Housing Opportunity Solicitation - Summer 2023

August 30, 2023

Mandatory Informational Webinar

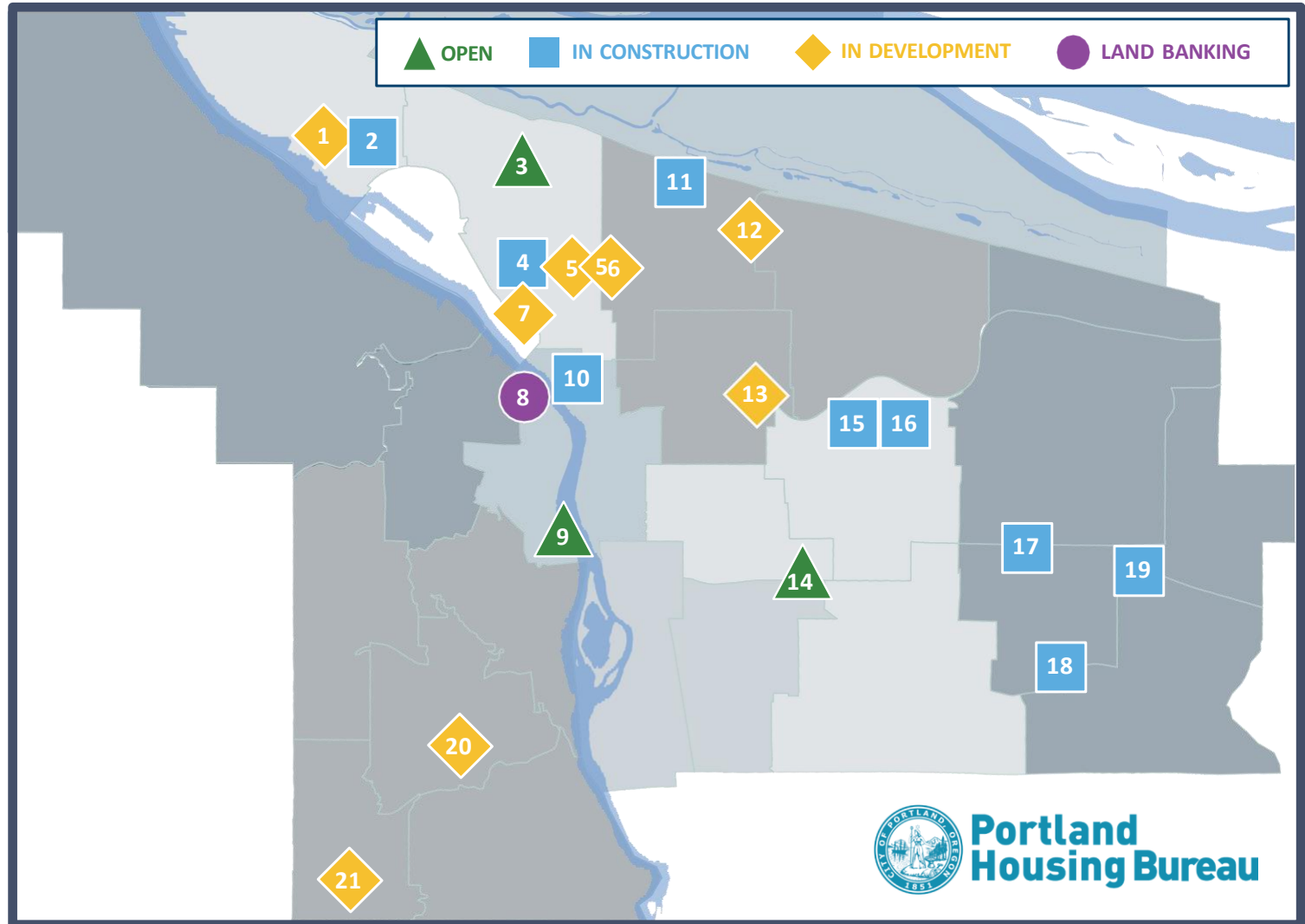
Agenda

TOPIC

LEAD

Welcome	Molly Rogers
Solicitation Overview	Jill Chen, Tanya Wolfersperger
Supportive Housing	Kristina Goodman
Submittals and Evaluation	Megan Grillo
Questions	All
Closing	All

- \$211 MILLION ALLOCATED TO PORTLAND
- 1,475 UNIT GOAL
- 1,541+ UNITS OPEN OR IN DEVELOPMENT
- 4,000+ PORTLANDERS HOUSED
- 271 UNITS OPEN
- 277 UNITS OPENING IN '24
- 940 UNITS EXPECTED IN '25 AND '26
- 747+ FAMILY-SIZED UNITS
- 289+ PERMANENT SUPPORTIVE HOUSING UNITS
- 544+ DEEPLY AFFORDABLE UNITS
- \$148M ALLOCATED, OVER \$60M EARMARKED OR RESERVED



1 Carey Boulevard	8 Broadway Corridor	15 Aldea at Glisan Landing
2 Tistilal Village	9 Waterleaf	16 Beacon at Glisan Landing
3 Hattie Redmond Apartments	10 Albina One	17 Meridian Gardens
4 5020 N Interstate	11 Dekum Court	18 Powellhurst Place
5 Strong Family Site	12 PCC Killingsworth	19 Garden Park Estates
6 Abbey Lot Townhomes	13 hollywoodHUB*	20 Barbur Apartments
7 M. Carter Commons	14 Findley Commons	21 Portland Value Inn

*73 out of 222 units only.



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Solicitation Overview

Schedule

Solicitation Issued

Friday, August 25, 2023

Proposal Due Date	Monday, September 25, 2023 at 3:00pm (PDT)
Review Committee Evaluation	October 5-6, 2023
Anticipated Notice of Awards	October 18, 2023

Available Resources – All Projects

Fund Source	Purpose	Amount
PHB Metro Housing Bonds	Capital Costs	Up to \$19,088,000 (\$9,088,000 PSH only)
Multnomah County General Funds	Capital Costs or Acquisition Costs	Up to \$9,750,000
Portland Clean Energy Funds (PCEF)	PCEF Eligible Costs	Up to 10% for hard construction costs
Joint Office for Homeless Services (JOHS)	Supportive Services	Up to \$10,000 per SH unit
Home Forward Project Based Section 8 Vouchers	Rental Support	Up to 50 vouchers for 0-30% AMI units

Funding Requirements – Eligible Uses

PHB Metro Bond Funds

Under Measure 26-199, pay or reimburse **eligible Capital Costs** associated with the Project, including

- Land, acquisition and leasehold interest but not annual lease payments
- Construction costs for affordable housing and its amenities
- Required site work, infrastructure, predevelopment costs

Required Developer and CPA certification at each disbursement

Final CPA certification prior to conversion to perm

Set aside \$9,088,000 to support Permanent Supportive Housing (PSH) projects

Funding Requirements – Eligible Uses

Multnomah County General Funds

Innovative housing options: including affordable housing projects to provide the final amount needed to complete a purchase or renovation

Acquisition may be related to purchase of residential home, motel, hotel, cohousing, or other building to serve:

- individuals who are exiting homelessness;
- individuals who are involved in the criminal legal system; and/or
- elders or other individuals who have experienced long periods of homelessness

Preference for 30% AMI or below units

Funding Requirements – Eligible Uses

Portland Clean Energy Fund

Hard Construction Costs (1): Difference between baseline/lower efficiency option vs. proposed higher efficiency alternative:

- High efficiency electric water heating with preference for heat pumps
- High efficiency electric heating and air conditioning with preference for heat pumps
- High efficiency ventilation systems
- Above code, high value insulation
- High efficiency appliances
- Air sealing, which improves on code by at least 10% over Envelope Leakage Ratio

Funding Requirements – Eligible Uses

Portland Clean Energy Fund (2)

Full costs not already covered by another funding source:

- Solar generation
- Solar storage (new or existing renewable generation)
- Electric vehicle charging stations above electric vehicle readiness required by code
- Tree planting above code plus five years of establishment care.

Funding Requirements – Eligible Uses

Portland Clean Energy Fund (3)

Soft Costs: Full costs not already covered by another funding source:

- Costs of energy modelling associated with estimating energy savings from PCEF-funded measures
- Clean energy feasibility studies if not funded by other sources
- Tenant and building operations staff training on PCEF measures after initial occupancy

Investment Requirements

Preferences in Order of Priority



11 units of Supportive Housing



61 units at 30% AMI



Ready to Proceed

Investment Requirements

All Projects Regardless of Priority

- All units seeking subsidy must be *new* to Portland's inventory of regulated affordable housing
- New construction, acquisition and/or rehabilitation of existing unregulated units
- No stated minimum or maximum subsidy – this is gap funding
- All rental units supported by PHB regulated at 60% AMI or below; home ownership at 80% AMI or below
- PHB regulatory agreements for 99 years

Investment Requirements (cont.)

All Projects

**Project Overview Narrative incl.
Equity Narrative**

Supportive Service Plan, if PSH

***Readiness to Proceed & OHCS Site
Review Checklist***

Pro Forma Model

**Preference Policy, if located in Interstate
Corridor URA**



Preference Criteria

Readiness to Proceed

- Permit status / readiness
- Contractor GMP bids / construction status
- Awarded financing and/or tax credits from OHCS, if applicable
- Commitment from lenders and/or equity investors
- Focused on 30% AMI with rental support
- Focused on PSH with supportive services funding

Priority Population and Programming

- Priority Populations including BIPOC
- More than minimum 20 required units

Leverage

- Significant leveraging of non-City/County resources

Additional Considerations

- **Project-based Section 8 (PBS8) vouchers**
- **Choice-limiting Actions** triggered by application date
- Approved **HUD Environmental Review** for PBS8
- PHB Policies including **Equity in Contracting, Green Building Policy** and **Air Conditioning Policy**
- **Funding Requirements:** "color of money"
- **Communications:** recognition and reporting



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PHB Policies

Equity in Contracting Aspirational Goals

Hard Costs

30% DMWESB-SDV

14% Subgoal D/M/WBE



Soft Costs

20% DMWESB-SDV



Workforce Training

20% Apprentice utilization per trade



PHB Green Building Policy

New Construction

- Certification: LEED, Earth Advantage or equivalent rating systems as approved by PHB

Rehabilitation

- Certification: LEED Silver, Earth Advantage Silver, or equivalent rating systems as approved by PHB
- Certification may depend on Scope of Work. If certification cannot be achieved, an alternative strategy will be documented in collaboration with Senior Construction Coordinator and will require approval of PHB management.

NOTE:

Oregon State EV Charging legislation, taking effect July 2022:

- <https://olis.oregonlegislature.gov/liz/2021R1/Measures/Overview/HB2180>

A/C Requirement: Acceptable Technologies

Acceptable Technologies Include:

- Central/ducted air conditioning
- PTAC/PTHC
- Ducted/ductless heat pump units (mini-splits)
- Window A/C units
- Portable A/C units
- Hybrid, geothermal, and other emerging technologies

Systems must deliver Air Conditioning to all dwelling units

If opting for portable/window units, developers must purchase and provide units (not just window ports)



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Supportive Housing

Supportive Housing (SH)

Supportive Housing (SH) is an effective housing solution for people who have complex needs and have experienced long periods of homelessness. SH provides residents with deeply affordable housing and ongoing supportive services designed to address a range of needs, including primary and behavioral health care. Services must be offered voluntarily for the duration of tenancy.

Eligible Populations

Supportive Housing is prioritized for people with disabilities and long experiences of homelessness that are severe enough to require long-term housing support.

Investment Requirements for SH Projects

Requirements for all proposals with SH:

- JOHS qualified vendor of supportive housing services
- Referrals from Multnomah Coordinated Access Systems
- Submit SH Services Plan
- Adherence to the SH Services Guidelines and provision of Baseline Services

SH Services Plan

All proposals with SH are required to submit a **Services Plan Narrative** that describes:

- Delivery of culturally responsive and/or culturally specific services; plans to support tenants in crisis
- Types and level of services to be offered
- Overview of anticipated services outcomes for target population
- Description of projects commitment to equity-centered property management including low barrier screening and occupancy policies
- Marketing and lease up plan to reach targeted population through coordinated access
- Budget and sources of funding for services, including leveraged sources



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BOS Submittals and Evaluation

Application Requirements

Highlights:

- Sponsor cover page
- PHB Funding Application
- Project Overview Narrative
- SH Services Plan Narrative, if applicable
- Readiness to Proceed Checklist



Other:

- Pro Forma - “live” Excel including Summary and SH services budget
- Organization financials – if PHB doesn’t have them already
- Project Schedule
- Project Site Review Checklist
- PCEF Eligible Use Cost application

Electronic submission: name documents and upload zip file

Evaluation Process



Threshold Review



Evaluation Review Committees and Ranking



Interviews/Presentations

Questions?

Submit questions by September 5th

FAQ to be distributed by September 8th

Contact:

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END OF PRESENTATION