

**CONSOLIDATED ANNUAL PERFORMANCE AND EVALUATION REPORT
CLACKAMAS COUNTY, OREGON**

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I. EXECUTIVE SUMMARY

This Consolidated Annual Performance and Evaluation Report (CAPER) reports on the progress made in program year 2013-14 towards achieving the goals identified in Clackamas County's current and previous Consolidated Plans. The current Five-Year Consolidated Plan (Con-Plan) covers the period beginning July 1, 2012 and ending on June 30, 2017. It was developed with the input of participating cities, various County agencies, and other public and private individuals and organizations to develop strategies to achieve the goals of providing decent housing and suitable living environments and expanding economic opportunities.

The Con-Plan's long-term goals are primarily targeted to low- and very low-income residents of Clackamas County and fall into two basic categories:

- Community Development (non-housing), and
- Housing (which includes projects that address homelessness).

The County uses federal grants and the program income they generate to fund projects and activities that further the Con-Plan goals. The three primary grant sources which the County receives through the U.S. Department of Housing and Urban Development (HUD) are:

- Community Development Block Grant (CDBG),
- Emergency Solutions Grant (ESG), and
- HOME Investment Partnerships Program (HOME).

CONSOLIDATED PLAN – GOALS, STRATEGIES and PERFORMANCE MEASURES

COMMUNITY DEVELOPMENT GOALS

CD-1: Revitalize low- and moderate-income neighborhoods

- Provide safe and accessible neighborhood streets and walkways/bikeways, especially near schools.
- Support the revitalization of distressed neighborhoods through infrastructure and facilities improvements.

Five-Year Performance Measure	690 households ¹ (1,765 persons)
Annual Goal	353 persons
2013 Accomplishment (based on completed activities)	548 persons

CD-2: Improve community infrastructure and facilities

- Create or improve community facilities that deliver crisis/safety net or self-sufficiency services.
- Construct public improvements to support the development of affordable housing and/or support business development or retention.
- Support the removal of barriers to accessibility by persons with disabilities and senior population.

Five-Year Performance Measure	300 households
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¹ The Consolidate Plan states that the average household size in Clackamas County is 2.56 persons.

	(768 persons)
Annual Goal	154 persons
2013 Accomplishment (based on completed activities)	2,667 persons

HUMAN SERVICES GOALS

HS-1: Stabilize the lives of families and individuals who are in crisis

- Focus on the prevention of homelessness and other personal crises through intervention services tied to rental assistance.
- Rent-Well tenant training and supports.
- HomeBase services to individuals and families that are homeless or at risk of homelessness.

Five-Year Performance Measure	250 persons
Annual Goal	50 persons
2013 Accomplishment (based on completed activities)	1,052 persons

HS-2: Increase the self-sufficiency of residents, particularly low-and moderate-income families and individuals as well as other special needs populations who are in need of a range of community supports and services

- Support the preservation of basic community services and seek their expansion.
- Assure that special needs populations, people with mental illness, people with disabilities and the elderly have access to essential services so they can reach their potential for independence.
- Expand opportunities for employment at living wages for the unemployed and underemployed through vocational and job training, work skills development, counseling, continuing education and literacy, and job placement.
- Assure that youth are provided the services and support systems they need to mature into employment and community life.

Five-Year Performance Measure	750 persons
Annual Goal	150 persons
2013 Accomplishment (based on completed activities)	297 persons

HOUSING GOALS

H-1: Increase and improve housing that is affordable to renters

- Create new affordable housing for rent-burdened residents.
- Preserve and improve the quality of the affordable rental housing stock available to low-income families.
- Focus efforts to meet the housing needs of households with incomes below 50% of the area median.
- Support the development of housing for special needs populations and families with children while planning to meet the housing needs of a rapidly-growing senior population.

- Maintain strong partnerships between the County and private/public developers in the development and preservation of affordable rental housing.
- Assure that new affordable housing has accessibility to services and ease of access to public transit for travel to employment centers and other “centers of opportunity.”
- Support the County Department of Health, Housing and Humans Services’ “Housing Initiatives” strategies.
- Support the redevelopment of public housing units to improve the quality of housing.
- Develop a tenant-based rental assistance program.

Five-Year Performance Measure	307 households
Annual Goal	61 households
2013 Accomplishment (based on completed activities)	274 households

H-2: Stabilize existing homeownership and provide opportunities for new homeowners

- Stabilize homeownership through home repair, rehabilitation and assistance with sewer connections.
- Support the expansion of opportunities for low- and moderate-income households to become new homeowners, especially first-time homeowners.
- Support the use of manufactured homes and mobile home parks or subdivisions as a reasonable method of obtaining affordable housing, especially in rural areas.

Five-Year Performance Measure	270 households
Annual Goal	54 households
2013 Accomplishment (based on completed activities)	35 households

H-3: Reduce homelessness and meet the housing needs of special needs populations

- Support the goals of the Clackamas County Ten-Year Plan and Policies to Address Homelessness and the efforts of the Homeless Council to reduce homelessness in the County.
- Provide affordable housing and stabilizing services to persons who are at risk of homelessness.
- Support efforts to develop a flexible funding source to provide appropriate services and rental assistance to persons who are homeless or at risk of homelessness.
- Focus resources on the more vulnerable populations, including people with mental health problems, veterans, people with disabilities, people coming from institutions, people with addictions and victims of domestic violence.
- In partnership with private and public housing entities, develop a range of housing choices for vulnerable populations (including persons at risk of homelessness, homeless persons and other special needs populations), including a focus on meeting the need of chronic homeless persons for permanent supportive housing.
- Develop a set of program policies to create a 15% set-aside in all new affordable housing developments specifically to assist the target populations.

Five-Year Performance Measure	250 households
Annual Goal	50 households
2013 Accomplishment (based on CR-65, completed activities)	348 persons

H-4: Promote community awareness of the affordable housing needs of low-and moderate-income households, the needs of homeless persons and the ongoing need to ensure equal access of all households to housing resources

- Support projects and programs, such as the Housing Rights and Resources Program that affirmatively address and promote fair housing rights and further housing opportunities for all County residents in accordance with the Fair Housing Act.
- Promote public awareness of the issue of fair housing and support the education of tenants, prospective homeowners, landlords, developers, property managers and housing staff on the Fair Housing Act and the Americans with Disabilities Act.
- Update and support the recommendations in the Analysis of Impediments to Fair Housing.
- Promote Transit Oriented Development (TOD).
- Expand Project-based Rental Assistance programs (PBRA).
- Explore special voucher rent rates for high-rent areas (HACC).

Five-Year Performance Measure	10,000 Households
Annual Goal	2,000
2013 Accomplishment (HRR, FHCO and Legal Aid reported activities)	3,988

CD-1 - revitalize low- and moderate-income neighborhoods

Project Name / Location	Project	Grant	Benefit
<p>2013 NW Gladstone infrastructure Rehab Project / Gladstone The project includes street, sidewalk, waterline and storm drain improvements for 5 streets in the Echo Glenn, Abernethy and Portland Avenue area of the City of Gladstone.</p>	2013/14	CDBG	LMA Census Tract 219 Block Group 1 56.1% Low Mod
<p>Canby Sidewalks / Canby Construction of approximately 1,200 LF of sidewalks and curbs on SE 4th Avenue, SE 5th Avenue and S Manzanita Ct.</p>	2012/21	CDBG	LMA Census Tract 229.03 Block Group 4 61.6% Low Mod
<p>Risley Ave / Kellogg Ave Improvements / Oak Grove Construction of approximately 1,764 LF of new concrete sidewalks and curbs along Kellogg Avenue between McLoughlin Blvd. and Oatfield Road.</p>	2012/18	CDBG	LMA Census Tract 224 Block Group 2 54.9% Low Mod
<p>2013 Bell Road Improvements / Milwaukie This street improvements project includes construction of 3,525 lineal feet of new sidewalks, bicycle paths and drainage improvements along SE Bell Road in the North Clackamas Revitalization Area (NCRA).</p>	2013/2	CDBG	LMA Census Tract 216 Block Group 13 56.1% Low Mod
<p>Bell Road Bike Improvements / Milwaukie Construction of 3,525 LF of new sidewalks, bicycle paths and drainage improvements in the North Clackamas Revitalization Area.</p>	2012/08	CDBG	LMA Census Tract 216 Block Group 13 56.1% Low Mod

CD-2 - improve community Infrastructure and facilities

Project Name / Location	Project	Grant	Benefit
<p>2013 Youth Shelter Care Expansion - Parrott Creek / Oregon City This public facility project is for construction of a new 3,150 square foot dormitory building for special needs youth ages 12 to 18 at the Parrott Creek Ranch in Oregon City.</p>	2013/16	CDBG	LMC
<p>2013 Sandy Northside Sidewalk infill / Sandy This street improvements project is for construction of 1,100 lineal feet of new sidewalk, curbs and drainage improvements along Beers Ave, Bruns Ave, Bluff Road and Pleasant Street in Sandy.</p>	2013/11	CDBG	LMA Census Tract 234.02 Block Group 2 56.5% Low Mod
<p>2013 Milwaukie ADA Ramps / Milwaukie Installation of ADA ramps at sidewalk crossings along several streets in the City of Milwaukie to improve accessibility and pedestrian safety.</p>	2013/8	CDBG	LMC
<p>2013 Jackson Place Rehabilitation / Oregon City This project is to rehabilitate a transitional housing apartment building in Oregon City by replacing the roof, replacing the siding, improving the drainage, improving the fire alarms, water heaters and heating system.</p>	2013/18	CDBG	LMC
<p>Family Justice Center / Oregon City Remodel/conversion of an existing building into a single location for multi-disciplinary coordinated assistance for victims of domestic and sexual violence and their families.</p>	2012/23	CDBG	LMC
<p>River Road Head Start Kitchen / Milwaukie Renovation of the kitchen includes expanding food storage capacity and adding a walk-in freezer.</p>	2012/28	CDBG	LMC

HS-1 - stabilize the lives of families and individuals who are in crisis

Project Name / Location	Project	Grant	Benefit
2013 Rent Well / Countywide Rent Well is 15-hour tenant education program designed to help people overcome barriers to rental housing.	2013/17	CDBG	LMC
2013 Home Base / Milwaukie This program provides assistance to individuals, couples, and families with children who are homeless or at risk of becoming homeless.	2013/7	CDBG	LMC

HS-2 - increase self-sufficiency

Project Name / Location	Project	Grant	Benefit
2013 Emergency Solutions Grant Program / Countywide Implementation of the HESG Program. Includes funding the operation of 3 emergency shelters, funding of essential social services to homeless individuals and; funding homeless prevention and rapid re-housing assistance.	2013/5	ESG	

H-1 - increase and improve housing that is affordable to renters

Project Name / Location	Project	Grant	Benefit
2013 Multi-Family Rental Housing / Countywide Funds will be used for the construction of new housing projects or planned projects in the pre-development stage. Ikoi So Terrace (NHA)	2013/12	HOME	NA
Easton Ridge Apartments Rehabilitation / Happy Valley Rehabilitation of an existing 264-unit affordable multi-family rental housing project.	2012/25	HOME	
Tenant Based Rental Assistance / Countywide Limited term rental subsidies for families.	2012/22	HOME	
2013 Tenant Based Rental Assistance Program / Countywide NHA will act as subrecipient in providing services for this program.	2013/20	HOME	

H-2 - stabilize existing homeownership and provide opportunities for new homeowners

Project Name / Location	Project	Grant	Benefit
2012 Housing Rehabilitation Program (summary) / Countywide Loans and grants to assist with needed repairs and to improve access for persons with disabilities.	2012/110	CDBG	LMH
2013 NCRA Sewer Hook-Up Grant Program (summary) / North Clackamas Re Continuation of a residential sanitary sewer improvement program in the North Clackamas Revitalization Area (NCRA).	2013/191 0	CDBG	LMH
2013 Housing Rehabilitation Program (summary) / Countywide Provide financial assistance to low- and moderate-income persons for home repairs and handicap accessibility.	2013/110	CDBG	LMH
2013 CHAP Homebuyer Assistance (summary) / Countywide	2013/131 0	HOME	

H-3 - reduce homelessness and meet the housing needs of special needs populations

Project Name / Location	Project	Grant	Benefit
<p>2013 ESG Springwater (the Inn) / Clackamas This funding provides emergency homeless shelter operations for the Springwater Youth Shelter in North Clackamas. Shelter operations include staffing, utility costs, repairs and general operations.</p>	2013/501	ESG	LMC
<p>2013 ESG CWS Shelter / Countywide This funding provides emergency homeless shelter operations for the Clackamas Womens Services Shelter in Clackamas County. Shelter operations include staffing, utility costs, repairs and general operations.</p>	2013/502	ESG	LMC
<p>2013 ESG Annie Ross House / Milwaukie This funding provides emergency homeless shelter operations for the Annie Ross House in Milwaukie. Shelter operations include staffing, utility costs, repairs and general operations.</p>	2013/503	ESG	LMC

H-4 - promote community awarness of affordable housing needs

Project Name / Location	Project	Grant	Benefit
<p>2013 Housing Rights and Resources / Countywide This is an ongoing public service that provides housing information, legal aid, housing rights education, landlord training and housing referral services to all residents of Clackamas County.</p>	2013/4	CDBG	LMC
<p>2013 CHDO Operating Support / Countywide Funds will be provided to two non-profit housing development organizations: Northwest Housing Alternatives, Inc. and Proud Ground.</p>	2013/10	HOME	

P&A - support planning and administration of programs and organizations

Project Name / Location	Project	Grant	Benefit
<p>2013 Emergency Solutions Grant Program / Countywide Implementation of the HESG Program. Includes funding the operation of 3 emergency shelters, funding of essential social services to homeless individuals and; funding homeless prevention and rapid re-housing assistance.</p>	2013/5	ESG	
<p>2013 CDBG Administration / Administration These funds will be used for overall program administration, including program development, management and coordination, personnel, accounting, and grant compliance expenses.</p>	2013/3	CDBG	
<p>2013 CHDO Operating Support / Countywide Funds will be provided to two non-profit housing development organizations: Northwest Housing Alternatives, Inc. and Proud Ground.</p>	2013/10	HOME	
<p>2013 HOME Administration / Administration Funds will be used for general administration of the HOME program.</p>	2013/9	HOME	

Summary of Resources and Distribution of Funds

Clackamas County received federal funds in program year 2013-14 from the following sources:

Federal Fund Source:*	2013-14 Funds Received:	2013-14 Funds Committed:	2013-14 Funds Expended:
CDBG Entitlement	2,047,968.00	2,047,968.00	602,828.33
CDBG Program Income	244,731.58	244,731.58	165,535.12
HESG Entitlement and Administration	142,472.00	142,472.00	119,418.04
HOME Entitlement	741,398.00	201,349.19	0.00
HOME Program Income	42,479.99	42,479.99	42,479.99
TOTAL	3,219,049.57	2,679,000.76	930,261.48

*Source: IDIS PR01, PR91

The geographic distribution of 2012 and prior year funds is shown in the table in Section II. That table also calculates the distribution of funds for the various projects and includes federal and non-federal fund sources.

II. FIVE-YEAR PLAN -- ASSESSMENT OF PROGRESS

The table in this section provides detailed information on projects and activities identified in the current and previous Con-Plans that were **open** in the reporting period. The projects are grouped according to the targeted Con-Plan goal. Information contained in the table is from the following IDIS reports: PR 02, PR 03, PR 06, PR 07, PR 22 and PR 25. Details include:

- Project name
- Geographic location of the project
- The Action Plan and IDIS Project Number (NSP projects don't have an IDIS number)
- The user/beneficiary of the project (CDBG-funded projects only):

LMA	Low Mod Area Benefit	VL	Very Low Income	SNP --	Special Needs Population
LMH	Low Mod Housing	LM	Low Mod Income	Y --	Youth
LMC	Low Mod Clientele	PB	Presumed Benefit	E --	Elderly
- The project's performance indicator, outcome and objective:

	Availability/Accessibility	Affordability	Sustainability
Decent Housing	DH-1	DH-2	DH-3
Suitable Living Environment	SL-1	SL-2	SL-3
Economic Opportunity	EO-1	EO-2	EO-3
- The amount committed in the reporting period (prior year commitments are not shown)
- The amount invested/expended in the reporting period (includes prior year funds)
- The proposed outcome (number planned) and the actual outcome (number served in the reporting period)
- The actual outcome for the activity
- The status as of the end of the reporting period

Possible changes to the County's program as a result of recent experience.

Community Development:

- Continues to monitor the federal budget issues and will consider adjustments to our current program delivery model and staffing patterns to handle increased or decreased funding in the future.
- Will continue to collaborate with other divisions of the County's Health, Housing and Human Services Department to develop, plan and implement:
 - A rental housing habitability code enforcement program – Housing Goal #1; and
 - "House RX", an effort to align available resources to mitigate environmental issues in the home that are causing health problems – Housing Goal #2.

Priority A Strategy	Project Name	Location	Project #	IDIS #	NAIB Code	Benefit	Fund Source	Committed to Reporting Year	Expended to Reporting Year	Performance Indicators	Program / Objective	Proposed Outcome	Actual Outcome	Status as of 6/30/10	
CD-1 - Projects that revitalize low- and moderate-income neighborhoods															
CD-1	2013 NW Gladstone Infrastructure Rehab Project	Gladstone	2013/14	1321	03K	LMA	CDBG	\$250,000	\$10,340	Public Facilities	SL-1	1	1	open	
CD-1	Canby Sidewalks	Canby	2012/21	1243	03L	LMA	CDBG	\$461	\$461	People	SL-1	300	293	completed	
CD-1	Risley Ave / Kellogg Ave Improvements	Oak Grove	2012/18	1242	03L	LMA	CDBG	\$179,795	\$179,795	People	SL-1	255	255	completed	
CD-1	2013 Bell Road Improvements	Milwaukie	2013/2	1317	03L	LMA	CDBG	\$245,000	\$136,304	Public Facility	SL-1	1	1	open	
CD-1	Bell Road Bike Improvements	Milwaukie	2012/08	1232	03L	LMA	CDBG	\$1,758	\$1,758	Public Facilities	SL-1	1	1	completed	
								\$677,014	\$328,658						

CD-2 - Projects that improve community Infrastructure and facilities

CD-2	2013 Youth Shelter Care Expansion - Parrott Creek	Oregon City	2013/16	1323	03D	LMC	CDBG	\$150,000	\$7,089	Public Facilities (beds)	SL-1	27	27	open	
CD-2	2013 Sandy Northside Sidewalk infill	Sandy	2013/11	1320	03L	LMA	CDBG	\$157,067	\$152,000	People	SL-1	115	117	completed	
CD-2	2013 Milwaukie ADA Ramps	Milwaukie	2013/8	1319	10	LMC	CDBG	\$146,342	\$131,185	People	SL-1	2523	2523	completed	
CD-2	2013 Jackson Place Rehabilitation	Oregon City	2013/18	1332	03C	LMC	CDBG	\$50,000	\$50,000	Public Facilities	SL-1	1	1	completed	
CD-2	Family Justice Center	Oregon City	2012/23	1280	03	LMC	CDBG	\$100,543	\$100,543	Public Facilities	SL-1	1	1	completed	
CD-2	River Road Head Start Kitchen	Milwaukie	2012/28	1325	03	LMC	CDBG	\$157,953	\$157,953	Public Facilities	SL-1	1	1	Open	
								\$761,904	\$598,769						

HS-1 - Projects that stabilize the lives of families and individuals who are in crisis

Priority & Strategy	Project Name	Location	Project #	IBIS #	Math Code	Health	Fund Source	Committed in Reporting Year	Expended in Reporting Year	Performance Indicators	Threats / Objectives	Program / Initiative	Actual (Budget)	Status as of 6/30/10
HS-1	2013 Rent Well	Countywide	2013/17	1310	05	LMC	CDBG	\$85,000	\$68,202	People	SL-1	80	507	open
HS-1	2013 Home Base	Milwaukee	2013/7	1318	06	LMC	CDBG	\$25,000	\$21,747	People	SL-1	2100	545	open

\$110,000 \$89,949

HS-2 - Projects that increase self-sufficiency

HS-2	2013 Emergency Solutions Grant Program	Countywide	2013/5	1316			ESG	\$89,934	\$89,934	People	SL-1		297	open
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\$89,934

H-1 - Projects that increase and improve housing that is affordable to renters

H-1	2013 Multi-Family Rental Housing	Countywide	2013/12	1328		NA	HOME	\$1,150,000	\$0	Households	DH-1	35		open
H-1	Easton Ridge Apartments Rehabilitation	Happy Valley	2012/25	1285			HOME	\$275,286	\$63,314	Households	DH-2	264	264	Open
H-1	Tenant Based Rental Assistance	Countywide	2012/22	1283			HOME	\$7,965	\$7,965	Households	DH-2	25	6	completed
H-1	2013 Tenant Based Rental Assistance Program	Countywide	2013/20	1337			HOME	\$80,130	\$53,269	Households	DH-2	10	10	open

\$1,513,381 \$124,548

H-2 - Projects that stabilize existing homeownership and provide opportunities for new homeowners

H-2	2012 Housing Rehabilitation Program (summary)	Countywide	2012/11		14A	LMH	CDBG	\$78,908	\$78,908	Households	DH-2	4	4	completed
H-2	2013 NCRA Sewer Hook-Up Grant Program (summary)	North Clackamas Renewal Area	2013/19	10	14A	LMH	CDBG	\$78,485	\$78,485	Households	DH-3	15	12	
H-2	2013 Housing Rehabilitation Program (summary)	Countywide	2013/11	0	14A	LMH	CDBG	\$562,959	\$562,959	Households	DH-2	15	16	completed
H-2	2013 CHAP Homebuyer Assistance (summary)	Countywide	2013/13	10			HOME	\$33,370	\$33,370	Households	DH-2	10	3	open

\$753,722 \$753,722

Priority & Strategy	Project Name	Location	Project#	IDIS#	Matrix Code	Benefit	Fund Source	Committed in Reporting Year	Expended in Reporting Year	Performance Indicators	Objective / Outcome	Proposed Outcome	Actual Outcome	Status as of 6/30/10
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H-3 - Projects that reduce homelessness and meet the housing needs of special needs populations

H-3	2013 ESG Springwater (the Inn)	Clackamas	2013/50 1		03T	LMC	ESG	\$10,200	\$10,200	People	DH-1	17	15	Open
H-3	2013 ESG CWS Shelter	Countywide	2013/50 2		03T	LMC	ESG	\$39,867	\$39,867	People	DH-1	150	169	Open
H-3	2013 ESG Annie Ross House	Milwaukie	2013/50 3		03T	LMC	ESG	\$39,867	\$39,867	People	DH-1	480	164	Open

\$89,934

\$89,934

H-4 - Projects that promote community awareness of affordable housing needs

H-4	2013 Housing Rights and Resources	Countywide	2013/4	1309	05	LMC	CDBG	\$140,000	\$82,380	People	SL-1	2000	3988	open
H-4	2013 CHDO Operating Support	Countywide	2013/10	1330	21I		HOME	\$12,000	\$9,000	Organizations	DH-2	2	2	open

\$152,000

\$91,380

P&A - Projects that support planning and administration of programs and organizations

P&A	2013 Emergency Solutions Grant Program	Countywide	2013/5	1315			ESG	\$41,878	\$18,824		SL-1			open
P&A	2013 CDBG Administration	Administration	2013/3	1312	21A		CDBG	\$409,590	\$339,771	None	SL-1			completed
P&A	2013 CHDO Operating Support	Countywide	2013/10	1331	21I		HOME	\$4,000	\$4,000		DH-3	2		completed
P&A	2013 HOME Administration	Administration	2013/9	1313			HOME	\$74,140	\$74,140	None	DH-2			completed

\$529,608

\$436,735

III. ASSESSMENT OF ANNUAL PROGRESS

A. Affirmatively Furthering Fair Housing

The **2012 Analysis of Impediments to Fair Housing Choice** identified five broad impediment areas. These impediment areas were based on analysis of existing data and broad public input. The impediment areas are also consistent with conclusions about areas of impediments to fair housing choice drawn in the Clackamas County 2005 AI and those identified in neighboring counties and cities. Some impediments, such as discrimination in housing, can be addressed with strategies aimed at identification and enforcement, as well as education (consumer, provider and housing industry). However, this is not meant to imply that eliminating discrimination is a simple matter.

These impediments and identification of goals reflect the complexity and (in many cases) the benefit of a regional approach to solutions.

1. Violations of fair housing laws in renting and purchasing property
2. Lack of knowledge of fair housing laws, including confusion about ADA and fair housing laws
3. Patterns of disadvantage for minorities and other protected classes – location, income, education
4. Lack of suitable affordable (including subsidized) housing in general, and lack of choice by quality, accessibility, location, type of units and access to opportunities
5. Land use and other public policies may be barriers to developing affordable housing

Goals of the Fair Housing Partners

CDD assembled a group called Fair Housing Partners to identify goals and strategies. The group includes the cities, towns and hamlets in Clackamas County, Clackamas County Social Services Division (SSD), Housing Authority of Clackamas County (HACC), Clackamas County Department of Transportation and Development (DTD), the Fair Housing Council of Oregon (FHCO) and, the Legal Aid Services of Oregon (LASO).

The group identified the following six Fair Housing goals in preparation of the AI plan. A full listing of the AI Goals, Strategies and Action Steps is located on pages 50 through 54 of the AI Plan.

- Goal I: Fair housing laws are enforced
- Goal II: People and agencies/institutions know about fair housing
- Goal III: Integrative patterns are promoted
- Goal IV: Fair housing is attained regionally
- Goal V: All rental housing is habitable
- Goal VI: Actions are guided by local and regional data

The following Strategies and Accomplishments address only Goals I through IV as directed by the HUD FHEO in order to focus reporting on Fair Housing related goals. They are intended to reduce the impediments to fair housing choice in Clackamas County.

Actions Taken and Analysis of Impact

Goal	Strategy	Primary Partners (Lead in BOLD)	Accomplishments
I.1	Maintain a system for reporting fair housing law violations (Impediment 1)	SSD	SSD maintained a Housing Rights and Resources program that received 3,663 calls from July 1, 2013 to June 30, 2014. The program personnel work with callers to identify fair housing law violations. Of the 516 persons assisted who had potential fair housing requests, 91 or 17.6% has a disability, 7 (1%) were African-American, 87 (16.7%) were Hispanic/Latino, and 4 were Native American.
I.2	Commit to countywide and regional support to continue and enhance enforcement of fair housing laws (Impediment 1)	SSD CDD	SSD has annual contracts with the Fair Housing Council of Oregon FHCO (\$10,770) and Legal Aid Services of Oregon (LASO) (\$81,250) to provide enforcement of fair housing laws. FHCO assisted 209 people with housing information. 31 (15%) were Latino and 12 (6%) were African American. CDD is meeting regularly with regional partners to discuss audit testing options.
I.3	Support complaint-based testing at the local and county level to improve enforcement of fair housing laws (Impediment 1)	SSD CDD	SSD collects and sends Housing Rights and Resources program (HRR) information and referrals to CDD and FHCO. 774 calls to HRR had a potential fair housing issue. 15 of these clients were referred to Legal Aid for actionable fair housing issues. In addition, 367 of these initial fair housing inquiries were referred to Legal Aid for actionable landlord tenant issues. Of these, Legal Aid provided services to 301 Clackamas County residents to improve enforcement of fair housing laws.
I.4	Support audit testing (rental and lending) at the regional (multi-county and multi-city) level to discover fair housing law violations (Impediment 1)	CDD SSD	CDD has been meeting quarterly with regional partners to strengthen audit testing options to discover fair housing laws violations. FHCO has provided housing discrimination and complaint information from federal (HUD) and state (BOLI) to the regional partners. Meetings were held on August, 22, 2013, August 28, 2013 (FHCO) and March 19, 2014
II.1	Improve access to fair housing information (Impediment 2)	CDD SSD	CDD has met with regional partners and the Fair Housing Council of Oregon to coordinate Fair Housing activities, develop a centralized resource and to develop fair housing materials in multiple languages and formats.
II.2	Provide fair housing education and training to consumers (and the general public); local governments and policy makers (and civic and community leaders); and, housing providers (planners, agencies, lenders, building industry,	SSD FHCO CDD	A total of 3,663 consumers received housing information and materials from HRR. FHCO provided information directly to 133 tenants. FHCO provided fair housing information to 55 landlords, property managers, and individuals in agencies and businesses that provide housing services.

	housing inspectors, landlords) (Impediment 2)		A total of 55 housing professionals received fair housing information and materials from FHCO.
III.1	Expand opportunities for tenants using Housing Choice Vouchers (Impediment 3,4)	HACC	<p>The Housing Authority of Clackamas County has landlord outreach materials posted on the HACC website: http://www.clackamas.us/housingauthority/</p> <p>2014 Landlord Training Events: April 7th, 2014- Oregon Landlord Tenant Law May 30th, 2014- HB 2639 New Section 8 Law</p> <p>Outreach for all of these events were done by the following:</p> <ul style="list-style-type: none"> • Direct email invitations to our landlord email list • Announcements on the Metro Multi Family Calendar of events • Fair Housing Council of Oregon Announcements • Promoted on HACC Website • Word of mouth through property management companies, etc <p>Landlord Newsletters were distributed to all landlords in Summer 2013, Fall -Winter 2013/14 and Spring 2014. The newsletters are posted at the HACC website.</p>
III.2	Expand housing opportunities for people with disabilities (Impediment 3,4)	CDD	# of Housing units built or purchased with HOME or CDBG funds. No housing units were built or acquired for this purpose in the reporting period
IV.1	Participate in regional efforts to promote fair and affordable housing	CDD	CDD has met with regional partners to begin discussions to coordinate fair housing efforts and activities in Clark County (WA), Multnomah (OR), Washington (OR), and Clackamas (OR) Counties. The two latest meetings were held on March 19, 2014 and May 28, 2014.
VI.1	Maintain County data on violations and potential violations of fair housing laws and use to promote fair housing and to conduct fair housing training/education (Impediment 1,2)	SSD CDD FHCO	<p>FHCO has provided CDD discrimination information from fifteen (15) complaints in Clackamas County in 2013 and 2014. Three (3) of the complaints were based on familial status. Seven (7) were based on disability, two (2) were based on source of income, the last three were based on race, national origin and domestic violence.</p> <p>HUD reported a total of ten (10) complaints in Clackamas County. Five (5) complaints were based on disability status, 1 was based on familial status, and 2 were based on national origin and 2 was based on race. Of these 10 complaints, 1 was found to have No Cause, 2 resulted in a negotiated settlement, 1 was settled and 7 are still open cases under investigation.</p>
VI.2	Coordinate with Housing Authority of Clackamas County to include annual	HACC CDD	The April 2014 HACC waitlist for housing vouchers has 1,750 households. 287 (16%) are elderly and 633 (36%) have disabilities. 185 (10%) are Black,

reporting of wait list and housing recipients (Impediment 3,4)	94(5%) are Hispanic, 41(2%) are Native American and 45 (3%) are Asian or Pacific Islanders. 1,572 (90%) are in extremely low income households.
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*Partners: CDD: Community Development Division ❖ SSD: Social Services Division ❖ FHCO: Fair Housing Council of Oregon ❖ HACC: Housing Authority of Clackamas County ❖ DTD: Development and Transportation Department

CD staff have contacted Ivette Rivera-Giusti at HUD to discuss the AI goals and performance reporting. The FHEO technical assistance is ongoing. Clackamas County has also addressed these Impediments by staffing both the Housing Authority of Clackamas County (HACC) and the Social Services Division Housing Rights and Resources program with Spanish and Russian speaking staff. Spanish and Russian are the languages spoken by the two largest minority groups in Clackamas County. The location and housing disparities are being addressed with minority populations by providing housing information to each minority group.

The income and education disparities are being addressed through housing information and through the HACC public housing resident services. County Social Services Division programs and services also provide minority populations to stabilize families and access services so that minorities and female-headed housings can increase income and education levels for members of their families.

AI Impediments IV and V regarding affordable housing, land use policies and fair housing are being addressed at the County level by the newly formed Housing Advisory Board (HAB). The HAB has been meeting regularly to analyze County policies to improve the availability and access to affordable housing for all low-income families in Clackamas County. The HAB will also analyze the adverse impact of these affordable housing policies on the protected groups residing in Clackamas County.

The Fair Housing Council of Oregon received 140 telephone calls from Clackamas County residents requesting information or reporting incidents of housing discrimination between July of 2013 and June of 2014. Of those 140 calls, 15 cases were opened to conduct investigations many of which were denials of reasonable accommodations for disabilities. As of July 30, 2014 only 3 cases remained under investigation for refusal to rent. The Fair Housing Council has additional information on the result of the investigations.

B. Affordable Housing

The ConPlan’s affordable housing goals and strategies are delineated in Section I of this CAPER. The first table in that section provides a summary of the projects undertaken in the reporting period related to the Community Development, Human Services and Housing goals and strategies.

The table in Section II provides detailed information on projects and activities identified in the current and previous Con-Plans that were open, and those that were completed, in the reporting period. The projects in that table are grouped according to the targeted Con-Plan goal. Some of the projects that were listed under the previous ConPlan have been moved to the appropriate goal of the current ConPlan.

The table below compares the proposed **numeric goals from the Action Plans** with the actual number of extremely low-, low- and moderate-income renter and owner households assisted (activity completed in IDIS) during the reporting period from those **CDBG- and HOME-funded projects**. These projects meet the Section 215 requirements of affordable housing as defined in 24 CFR 92.252 for rental housing and 24 CFR 92.254 for homeownership. (Source PR22 and PR03)

Households Assisted -- Activities Completed in 2013-14

CDBG- and HOME-funded Housing Activities

Project	Units Proposed in Action Plan	Actual Units Completed ❖	RENTERS			OWNERS		
			EL 0-30%	VL 31-50%	L 51-80%	EL 0-30%	VL 31-50%	L 51-80%
Housing Rehab (CDBG & HOME)	30	16	1	0	0	8	2	5
Down payment assistance (CDBG & HOME)	0	3	0	0	0	0	0	3
Sewer Hook-up (CDBG)	25	12	0	0	0	5	1	6
TBRA	10	10	0	10	0	0	0	0
TOTAL	65	41	1	0	0	13	13	14

❖ Additional units were completed using other fund sources. Those activities are listed in the table in Section II under Housing Goals 1 and 2.

C. Continuum of Care

Overview

Clackamas County's Continuum of Care system is a robust collaboration of public agencies, nonprofit organizations, and members of the community. In the 2013-14 program year, Clackamas County continued to lead the CoC planning process and assumed responsibility for:

- Providing staff resources and infrastructure for the CoC planning group and processes;
- Providing guidance to CoC's Discharge Planning, Homeless Point-in-Time Count and Mainstream Services integration efforts;
- Leading the governance restructuring of the CoC;
- Leading the implementation of a unified CoC-wide Coordinated Assessment process;
- Ensuring coordination of the CoC planning process with the Consolidated Plan and the Ten Year Plan to Address Homelessness; and
- Coordinating preparation of planning documents and applications.

The CoC's core planning group maintains the informal peer-to-peer and agency-to-agency networking and collaboration for which Clackamas County is well-known. The Continuum of Care meets at least monthly throughout the year.

CoC-funded Projects

The table below shows the renewal applications for funding of operations and/or services for the projects submitted to HUD in January, 2014 and the specific Con-Plan objectives being met by the project.

Project / Sponsor	Description	H3	H4	H5
Chez Ami Sponsor: Central City Concern	Permanent Supportive Housing for 40 homeless, disabled adults.	X	X	
Springwater Program Sponsor: The Inn	Transitional Housing for 7 homeless youth.	X	X	
Transitional Program Sponsor: Clackamas Women's Services	Transitional Housing for 3 families who are surviving domestic violence.	X	X	
HomeSafe Transitional Housing Sponsor: The Inn	Transitional Housing for 9 households of homeless youth and parenting teens.	X	X	
Avalon Sponsor: The Inn	A Permanent Supportive Housing facility with 6 units, for young, homeless women participating in the local Drug and Mental Health Courts.	X	X	
Jackson Sponsor: Clackamas County Social Services	Transitional Housing for 6 homeless single individuals.	X	X	
Janssen Sponsor: HACC	Transitional Housing for 8 homeless families.	X	X	
HOPE Sponsor: Clackamas County Social Services	Permanent Supportive Housing for 15 single, homeless individuals with disabilities.	X	X	
Rent Well Rapid Rehousing Sponsor: Clackamas County Social Services	Rental assistance and education to help build good renter skills, overcome barriers to permanent housing, and to pay fees, deposits and moving expenses.	X	X	X
Shelter Plus Care Sponsor: HACC	Permanent Supportive Housing for 34 households with adult, disabled members.		X	
Homeless Information Management System (HMIS) Sponsor: Community Development	HMIS provides information to HUD and the CoC to complete annual reporting, Point in Time Count information, annual application for funding, and to inform strategic planning and prioritization.	X	X	X
Permanent Supportive Housing Sponsor: CWS	Permanent Supportive Housing for 4 households surviving domestic violence.	X	X	
HomeBase Sponsor: NHA	Rapid Rehousing for 5 homeless households.	X	X	
HOPE II Sponsor: Clackamas County Social Services	Permanent Supportive Housing and services for 4 households with adult, disabled members.	X	X	

HIV/AIDS

Homeless persons diagnosed with HIV/AIDS in Clackamas County are assisted by the Cascade AIDS Project. This population is a heavy user of our Shelter + Care Program.

Ten Year Plan and Policy to Address Homelessness

The Homeless Policy Council was formed to bring public policy attention to homelessness and to measure progress on the goals set forth in the Ten Year Plan and Policy to Address Homelessness. During the program year the County undertook updating the plan.

Homelessness in Clackamas County: 2013 Count Summary Findings**

****PLEASE NOTE:** Clackamas County conducts a full homeless count only every 2 years. Therefore, the 2013 Count is used in 2014.

- There were 2,070 homeless persons counted
- The count included 965 children (47%), 1105 adults (53%)
- There were 1,160 persons in families with children
- There were 839 persons in adult-only households
- The count included 113 unaccompanied youth

2013 Homeless Subpopulation	Total # Counted
Chronically Homeless	191
Veterans	75
Substance Abuse	236
Mental Health	201
HIV/AIDS	7
Domestic Violence	312
Unaccompanied Youth	113

ESG Participation

All three of the shelters in the county that receive Emergency Solutions Grant funds are involved in the CoC planning process and have participated in establishing written policies for both the CoC and ESG projects. Their involvement is detailed below.

CoC Organizations / Persons	Subpopulations Represented	Level of Participation (activity and frequency) in Planning Process
Clackamas Women's Services (Melissa Erlbaum)	Domestic Violence	<ul style="list-style-type: none"> ♦ Regular attendance at monthly CoC planning meetings ♦ Integrates CoC with other DV planning processes in the county. ♦ Lead, DV shelters & scattered site Transitional and Permanent Supportive Housing for victims of domestic violence
Annie Ross House (Angela Trimble)	Domestic Violence, Substance Abuse, Seriously Mentally Ill	<ul style="list-style-type: none"> ♦ Regular attendance at monthly CoC planning meetings ♦ Sponsor: Emergency shelter for homeless families with children, transitional housing, homeless prevention and rapid rehousing.
The Inn (Tom Mitchell)	Youth (17-24)	<ul style="list-style-type: none"> ♦ Co-Chair of the CoC ♦ Liaison between CoC and homeless youth providers ♦ Regular attendance at monthly CoC meetings. ♦ Participation in Interagency Teen Planning Committee for children aging out of foster care ♦ Sponsor: Springwater Inn for homeless teens; HomeSafe for pregnant/parenting teens; Host Homes for unaccompanied homeless youth.

Continuum of Care Objectives

Objective 1: Create new permanent housing beds for chronically homeless individuals. The CoC goal for creating new permanent housing beds for the chronically homeless over the next ten years:

Permanent housing beds currently dedicated for chronically homeless persons:	42
Additional permanent housing beds planned to dedicate to the chronically homeless in the next 12-months:	8

Objective 2: Increase Housing Stability.

Percentage of homeless persons in CoC projects who have achieved housing stability in 2013:	93%
Percentage of homeless persons in CoC projects who have achieved housing stability in 2014:	93%
Percentage of homeless persons in CoC projects who are expected to achieve housing stability in 2015:	94%

Objective 3: Increase income of homeless project participants.

	2013 Actual Numeric Achievement and Baseline	2014 Proposed Numeric Achievement	2015 Proposed Numeric Achievement
Percentage of participants in all CoC-funded projects that increased their income from employment from entry date to program exit:	14%	17%	20%
Percentage of participants in all CoC-funded projects that increased their income from sources other than employment from entry date to program exit:	31%	40%	54%

Objective 4: Increase the % of CoC participants that obtain mainstream benefits.

	2013 Actual Numeric Achievement and Baseline	2014 Proposed Numeric Achievement	2015 Proposed Numeric Achievement
Percentage of participants in ALL CoC-funded projects that obtained non-cash mainstream benefits from entry date to program exit:	85%	85%	86%
Enter the percentage of participants in ALL CoC-funded projects that obtained non-cash mainstream benefits from entry date to program exit.		85%	85

Objective 5: Using Rapid Re-housing as a method to reduce family homelessness.

	2013 Actual Numeric Achievement and Baseline	2014 Proposed Numeric Achievement	2015 Proposed Numeric Achievement

Total number of homeless households with children per year that are assisted through CoC-funded rapid re- housing projects:	0	43	73
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Persons with Special Needs that are Not Homeless

In 2013, Clackamas County issued a Request for Proposals to address the supportive housing needs of non-homeless persons with special needs. Funds available through the RFP included CDBG, HOME and Project-based Section 8. Three proposals were accepted. One of the proposals would add project-based vouchers to support an existing CoC permanent housing project which was on financially shaky ground. Two proposals are new construction projects that would add to the housing stock. Both of those projects are in the early development stages and applying for primary funding under the federal low-income housing tax credit program.

D. Other Actions Taken

During the reporting period the county undertook the following actions:

a. Addressed obstacles to meeting underserved needs.

1. Leveraged available program funds by requiring sponsor contributions.
2. Sought additional funding from public and private sources to finance program activities.
3. Assisted homeowners and renters who needed safety and accessibility adaptations in order to remain in their own homes.
4. Assisted homeowners and renters in the North Clackamas Revitalization Area with the decommissioning of their septic tanks and cesspools and connection to a new sewer system.

b. Fostered and maintained affordable housing.

1. Provided owner-occupied housing rehabilitation assistance targeted at low- and moderate-income households.
2. Provided funding for the rehabilitation of an existing HACC-owned affordable rental housing to preserve its viability.
3. Weatherized housing units occupied by low-income households through Community Solutions for Clackamas County’s Weatherization Program.
4. Provided five home rehabilitation loans totaling \$111,289 and one homebuyer assistance loan of \$12,150 to residents of the North Clackamas Revitalization Area (NCRA).

c. Removed barriers to affordable housing.

1. Operated a homeownership assistance program, which assists low-income, first-time homebuyers with the purchase of a house. Assistance in the form of 0%-interest, deferred payment loans helped pay for down payments and closing costs.
2. Assisted the development of new rental housing units, which will be affordable to low- and moderate-income households.
3. Provided CHDO operating funds to the County’s two CHDOs to maintain and strengthen their capacity to develop affordable rental and home ownership housing.

4. Worked with HACC and Behavioral Health to combine fund sources into an RFP directed at soliciting proposals from developers to develop Drug and Alcohol Free housing.

d. Strengthened and overcame gaps in institutional structure.

1. Utilized staff resources to seek additional funding and maximize effectiveness of housing development efforts.
2. Provided information and technical assistance to private sponsors of potential housing and community development activities.
3. Continued to build on the cooperative efforts of CDD, HACC and Behavioral Health, to provide joint development, management and maintenance of special needs housing for chronically mentally ill adults.
4. Worked with a local non-profit and public service agency to build additional capacity to provide homeless prevention, rapid re-housing, and case management services to homeless families with children.
5. Cooperated with a local non-profit agency and public service agencies to expand capacity for providing services to women and children who were victims of domestic violence.

e. Improve Public Housing Resident Initiatives

1. Public Housing Resident Services: HACC provides a variety programs and services that help residents achieve self sufficiency as well as improve quality of life including: information and referral, resident association events, employment assistance, money management workshops, youth advocacy, mentoring, tutoring and homework help, neighborhood improvement projects, healthcare education, and support groups. Additionally, HACC works closely with other agencies such as the Oregon Food Bank, local school districts local law enforcement agencies, Portland State University MSW Program, area hospitals and other social services.
2. Resident Advisory Board: Public Housing residents are engaged in the management of the Housing Authority of Clackamas County (HACC) through its Resident Advisory Board (RAB). RAB membership is comprised of public housing leaders who represent the various public housing neighborhood associations. The RAB convenes not fewer than two times per year to develop, approve, review and evaluate HACC's Annual Plan. The RAB is also consulted for input and approval of any significant amendment or modification to the Annual Plan.

The Housing Authority Board of Commissioners includes one member who is a Public Housing resident.

3. Enhanced Financial Assistance Programs and Homeownership

Through its Resident Opportunity for Self-Sufficiency Service Coordination Grant Program, HACC offers a wide range of programs to assist public housing residents become economically self-sufficient and purchase a home. HACC partners with Clackamas County Social Services Proud Ground, Community Solutions of Clackamas County, and Workforce Investment Council of Clackamas County to:

- (a) Provide HACC residents with the opportunity to save for post-secondary education and homeownership using an Individual Development Account (IDA) matched savings account. A participant in an IDA program establishes a savings account with a qualified partner financial institution for the purpose of buying a home or pursuing post-secondary education program. The savings accumulated in the IDA are matched, at a 3 to 1 rate. Participants are required to complete classes in budgeting, financial management as well as in the focus area of their savings plan. IDA participants are required to reach their savings goal within 3 years.

- (b) Offer financial literacy education.
- (c) Implement Housing Works. Housing Works is a grant program from the Department of Labor that provides 1) training in high growth industries, 2) basic education, 3) career workshops, 4) paid internships, 5) on the job training, and 6) individual job coaching.
- (d) Provide information and referrals to residents interested starting or expanding a small business.
- (e) Provide information regarding the availability of volunteer tax assistance for public housing residents. The goal of this effort is to maximize public housing resident's participation in the Earned Income Tax Credit (EITC) Program and to reduce their utilization of costly instant-rebate tax help programs.

f. Evaluated and reduced lead based paint hazards

1. Updated and Implemented program guidelines requiring inspection for lead hazards of housing units rehabilitated through the Community Development Block Grant, HOME and NSP programs.
2. Educated and notified residents participating in housing rehabilitation and homebuyer programs of the hazards of lead-based paint.
3. Contracted with a professional firm to provide lead hazard evaluation services at no cost to the owners and buyers participating in the housing rehabilitation and homebuyer program.
4. Treated lead-based paint hazards, which were discovered, consistent with procedures, approved by HUD, the State Health Division and the Department of Environmental Quality.
5. Continued to participate in a regional partnership with the other local jurisdictions in the Portland metropolitan area to address common issues and solutions to problems resulting from the lead regulations.

g. Compliance with program and comprehensive planning requirements

Compliance with Section 3 of the Housing and Urban Development Act of 1968:

1. All bidders on projects for which construction is estimated to exceed a cost of \$100,000 are advised of HUD requirements to provide economic opportunities to low income residents of the project area.
2. Information regarding a bidder's status as a Section 3 Business Concern is requested with all bids and as a reporting requirement for successful bidders.
3. HUD Section 3 Business Concern information is standard language in each construction manual that is emailed or sent to potential bidders.
4. Construction crews for covered contracts are typically comprised of 2-10 employees with contract terms lasting 60-120 days. Hiring opportunities are discussed with contractors at each pre-construction conference. Construction firms often have sufficient personnel employed and usually do not hire additional employees for covered work.

h. Reduce the number of households below the poverty line

Clackamas County Social Services (CCSS) is the central county agency administering anti-poverty programs. CCSS' work has centered on the following activities:

- Working toward a coordinated and comprehensive service delivery system sufficient to meet basic shelter, food, health care and employment opportunity needs for all County residents.
- Providing leadership, in the County, to identify and resolve issues of poverty.

- Advocating for the continued development of essential services and acting in support of a responsive delivery system.
- Coordination with community based and faith based organizations to strengthen services for persons who are homeless or at risk of homelessness.

Toward these efforts CCSS operates the following programs:

- A comprehensive information and referral (I&R) service in partnership with 211, an internet-based resource guide, and an Aging & Disability Resource Connection Center (ADRC). CCSS hosts a bi-monthly networking meeting that offers agency service profiles to attendees.
- A Housing Rights and Resources assistance program which offers family shelter screening, help in locating low-cost housing and shelters, provision of landlord-tenant information, via a secondary referral for legal advice and legal counsel regarding fair housing issues.
- Permanent Supportive Housing Programs which focus on disabled and chronic homeless populations providing long term housing solutions and access to mainstream benefits such as SSI and SSDI.
- An Individual Development Account (IDA) Asset Building Program which provides low income households and Clackamas youth financial education along with matching funds to attend a post secondary educational/vocational institution or purchase a home for the first time.
- Self-sufficiency case management programs which provide assistance to individuals and families in identifying goals and timelines for achieving those goals, providing an array of resources and skill building opportunities with the goal of helping them to achieve self-reliance.
- Provision of food boxes and congregate meals, through contacts with private non-profit or faith-based agencies.
- A rental education program which assists low income households and people experiencing homelessness to overcome extensive barriers so they can obtain rental housing. Provision of rental assistance funds via community non-profit providers in partnership with CCSS.
- Volunteer programs to assist primarily elderly and disabled persons with needs such as financial services, transportation, and assistance with long term care insurance.
- Energy assistance programs designed to help those at 60% of the median income or less with the costs of heating their homes including the reduction of energy use in the home.
- A network of three severe weather shelters that open on nights when freezing or other severe weather is predicted including one new shelter in a rural area of Clackamas County.

During the last year CCSS expanded the work of the two year old, Homeless Policy Council (HPC), made up of members of the Clackamas County Board of Commissioners, County DA, the Sheriff's office non-profits, State DHS, school district representatives and other active community policy makers. Below highlights key progress made towards existing policy goals as well as new initiatives undertaken to assist in reducing poverty in the County.

- Safe Place To Park – A nonprofit partner made progress by locating a program site, getting the necessary approvals including neighborhood notification and conducting a 3 month pilot of the project

- Lack of Section 8 Rental Options – Advocated and monitored state legislation approved this year which addressed the issue of lack of willingness to rent to Section 8 clients on the part of landlords. This issue has had a significant impact on low income households obtaining housing.
- Access to Gainful Employment – Participated in the Workforce Investment Council of Clackamas County and advocated to ensure that workforce development programs are addressing the needs of low-income people in their service planning and delivery
- Impacts on Child Education – Started a two year pilot project to supplement the work of the homeless liaison in the school district most severely impacted by poverty and homelessness with an additional full time, bilingual staff member
- Homeless Veterans - Continued the work of the Veterans’ Advisory Committee to identify veteran-related issues. Conducted the first Clackamas County Stand Up for Veterans and their family members to provide a fun family day as well as extensive access to community resource information.
- Continued a county wide coordinated assessment workgroup, supplemented by a state discretionary grant, to examine national best practices and advance planning efforts for coordinated assessment implementation. The goal is to effectively and efficiently match homeless households with the type, level and duration of service that best fits their need.
- Creating a new homeless Continuum of Care governance structure to better coordinate homeless initiatives, policies and programs for low income populations in the county as well as improve performance and expand resources.
- Implementing CCSS wide poverty performance measures to assess progress in the following key poverty indicators: Economic opportunity, education, children’s care, health, housing, mobility, food, social, and life skills.
- Updated the County’s 10 year plan to address homelessness in a group process that considered input from multiple stakeholders including formerly homeless persons.

E. Leveraging Resources

In the 2013-2014 reporting period Clackamas County leveraged the federal formula grant funds it received as indicated below:

CDBG	CDBG program funds were leveraged with public and private funds through the CDBG Funding Policies. In order to be considered for funding, the policy requires project sponsors to commit matching funds equivalent to at least 20% of the project’s total budget.	962,005
ESG	The Emergency Solutions Grant was leveraged as indicated in the IDIS report CR-75 which is included in Volume 2 of this CAPER.	153,687
HOME	HOME funds were leveraged on Activity 1285, the Easton Ridge Apartments. Also, the County met the HOME matching requirements for the reporting period as shown on the form HUD-40107-A which is included in Vol. 2.	41,201,835
	Total	42,317,527

F. Citizens Comments

CAPER

The availability of this Consolidated Annual Performance and Evaluation Report was advertised in the August 20, 2014 editions of the Clackamas Review and Oregon City News and the August 21, 2014 edition of the Lake Oswego Review. The public notice stated:

Clackamas County is in the process of preparing the Consolidated Annual Performance and Evaluation Report for its 2013-2014 Community Development activities. Anyone interested in commenting on the draft report may obtain a copy by calling Clackamas County Community Development at 503.655.8359. Comments will be accepted until Monday September 22 at 2 p.m.

No comments on the CAPER were received.

ACTION PLAN

Public Meeting Summary, Clackamas County 2014 Action Plan

6:00p.m. Wednesday, February 26, 2014
2051 Kaen Road, Rm 288
Oregon City, Oregon

In Attendance:

George Abbott, Colton Helping Hands
Donna Fix, Colton Helping Hands
Debbie Holm, Colton Helping Hands
Durell Singleton, North Clackamas School District
Luc Smith, Northwest Housing Alternatives
Noe Zepeda, Northwest Housing Alternatives
Angela Trimble, Northwest Housing Alternatives
Michele Veenter, National Alliance for Mentally Ill (NAMI) Clackamas
Amy Vanacore, Metropolitan Family Service
Melissa Erlbaum, Clackamas Womens Services
Monica Lodolini, Madonna's Center
Valerie Ashbacher, Madonna's Center
Erica White, State DHS, Adult and Disability services
Laura Borders and Bill Zuber, parent volunteers with National Alliance for Mentally Ill (NAMI) Clackamas
Gary Knepper, Housing Authority of Clackamas County
Chuck Robbins, Housing and Community Development Director
Mark Sirois, Project Coordinator, Community Development Program

Mark Sirois, Community Development Division, opened the meeting at 6:00p.m. by thanking everyone for attending. Mark explained that the public meeting was a chance for community members to learn about the Community Development Program and the funding that HUD provides. The meeting also provides an opportunity to get information from citizens on the specific community needs and discuss potential future housing and community development projects in the County.

Mark continued by discussing the anticipated federal funding in the coming year. Cuts of up to 2% to Clackamas County CDBG, HOME will get flat funding and ESG funding is probably flat. Mark stated that all projects approved for funding will be funded. CD will get notification from HUD in April about the actual allocations from HUD.

Mark opened the floor for people to introduce themselves and discuss the needs they see in the community and their particular project ideas.

Public Comments:

Noe Zepeda and Luc Smith stated that they were resident services managers with Northwest Housing Alternatives. Noe and Luc were present to learn about any potential funding for public services such as the HomeBase program that helps residents remain stable in their housing.

Durell Singleton spoke on behalf of the Wichita Family Services Center and the need for a ramp so that people with disabilities can access the building more easily. The Center is in a former elementary school that was built in 1941. The Center could use many upgrades to the roof, parking lot and doorways.

Angela Trimble with Northwest Housing Alternatives was present to advocate for more funding for the HomeBase program that helps families with eviction prevention and housing assistance to get homeless persons into stable homes. Last year HomeBase help 211 households.

Erica White with the state Department of Human Services spoke on the need for accessible and affordable housing units for elderly and disabled persons.

Donna Fix spoke on behalf of the Colton Helping Hands food bank needs for a building. The food bank is operating in an old building owned by the local school district. The school district wants to sell the building to Colton Helping Hands. Colton Helping Hands is an all volunteer organization that is now assisting 150 families with food needs and other services. The building also serves as a community center and could be improves to provide additional meeting spaces and services such as cooking classes for low-income residents. Colton is a rural community with very few services. If the current building was owned by Colton Helping Hands they could get more grant funds to improve the building.

Chuck Robbins, Director of Housing and Community Services talked about the CDBG application process beginning in November 2014 and the process of applying for funding. Any funds awarded have requirements including a matching funds requirement and an obligation to operate the facility for 10 to 15 years depending on the amount of funding.

Michele Veenter with NAMI spoke about the need for housing for persons with different types of mental illnesses. Michele said that there are successful program in Clackamas County such as Chez Ami but we need a gambit of housing with different levels of support from independent living apartments to group homes. Many people that are currently homeless have some form of mental illness. There will be an increasing need as elderly parents who have been housing their adult children with mental illness become unable to provide that housing. If we don't have any housing for those persons leaving their family homes they will probably become homeless.

Amy Vanacore with Metropolitan Family Services works at the Wichita Family Center. Amy talked about the need for a park for kids to play in the area between 82nd Ave and I-205 in the Clackamas Mall area. We also need Rapid Re-housing Programs to help homeless families, utility assistance for low-income families, transportation services for people to get to the Family Services Center, expanded services at the Wichita Family Center including art programs, free dental work for major dental work that is not covered by the state health insurance program (OHP), mental health services and a Project Clean Slate type of program to help low income persons work off their criminal records through community service programs.

Melissa Erlbaum with Clackamas Womens Services spoke about the continued need for housing and services for survivors of domestic violence. There is a continued need for safe affordable housing,

transitional housing programs and units, rapid rehousing programs so that women and children can avoid becoming homeless due to domestic violence.

Bill Zuber and Laura Boarder are parent volunteers with NAMI. Bill and Laura said that more housing is needed for persons with mental illnesses. There are a few mental health housing projects that are successful and more is needed all over the county.

Valerie Ashbacher with the Madonna Center spoke about the need for housing options for pregnant and parenting teens. There are nearly 600 parenting teens in Clackamas County that need housing to get stable and keep their families intact. It seems like for the last 10 years there has been no improvement. The Fair Housing Law does not protect parenting teens because landlords can legally refuse teen parents from signing leasing agreement without an adult parent's signature? Valerie would like some funding to purchase or build a tri-plex to house the Madonna Center and provide family units for parenting teens. Many teens don't have rent histories so that makes it much harder to qualify for apartment leases. A rent subsidy program would also help to keep teens housed but often teens need to learn how to live with roommates if they are going to be independent. The RentWell program tenant education program does help with landlord rent deposit guaranties but more classes in different locations are needed.

Monica Lodolini also spoke about the need for teen parent housing and services. Monica has lived in the county for over 20 years and still remembers how hard it was for her to get housing when she was a teen parent. Monica feels that it is wrong that landlords can discriminate against young parents who are under 18 years old. It is very difficult to make the leap to adulthood when landlord will not let you rent safe housing. Many teen parents end up in unsafe housing with questionable neighbors.

Chuck Robbins thanked everyone for the community needs information and talked about the Priority Needs list referenced to select CDBG projects. The HOME funding will be supported several affordable housing projects. In the next few weeks Clackamas County will be releasing a Request for Proposals for 2 housing projects of 50 units each. The housing projects will be alcohol and drug-free housing. Chuck also mentioned that the newly formed Housing Advisory Board will be collecting information and making affordable housing recommendations to the Housing Authority and the Board of County Commissioners.

There was a general discussion about funding for homelessness, HUD priorities for homeless funding, the Housing First model and the Rapid Re-housing model. Someone mentioned that the state of Utah has been successful with the Housing First model.

A written letter was submitted by Colton Helping Hands in support of a proposal to purchase a building to house the Colton food bank and community center.

Written testimony was submitted by North Clackamas School District Wichita Family Center in support of funding a ramp for ADA access to the building.

Written testimony was submitted from elder services advocate, Erica White via email.

Mark asked everyone to make sure they had signed in so that they could be on the Citizen Participation list. The public meeting concluded at 7:45p.m.

Public Hearing Summary, Clackamas County 2014 Action Plan

Public Services Building, Hearings Room - 4th Floor, Room 409
2051 Kaen Road, Oregon City, Oregon
11:00am, Thursday, April 10, 2014

Commissioner John Ludlow opened the hearing at 11:00 a.m. Chuck Robbins, Director of the Housing and Community Development Division introduced himself to the Board of County Commissioners and the audience. Chuck Robbins explained the purpose of the meeting was to get public comments on the community development program. He stated that the 2014 Action Plan had been posted to the Community Development website and distributed to public sites. The 2014 plan was in 30- day comment period ending on April 21st at which point the plan would come back to the Board of County Commissioners for final approval on May 1st before the plan was submitted to HUD.

Chuck stated that the 2014 Action Plan is the 3rd year of our 5-year Consolidated Plan. The Action plan is an annual application for funding from the U.S. Housing and Urban Development (HUD). The amount of CDBG, HOME and ESG funds coming to the County is based on population and the agreements that the County has with each jurisdiction.

Chuck reported that in the past year CDBG funds have been responsible for 40 sidewalk ADA ramps in Milwaukie, the construction of the Family Justice Center, the completion of the Kellogg Ave Street and Sidewalk Improvements project and the rehabilitation of 43 homes for low-income households. In the coming year these funds have been cut by only 0.04% and it is anticipated that funding will continue in the coming years.

The HOME program funds helped to secure an affordable housing complex of about 35 affordable housing units in partnership with Northwest Housing Alternatives. HOME funds should be able to secure approximately \$5 million in Low Income Housing Tax Credits for the organizations developing the low income housing in the coming year. The HOME program is funding the Sandy Family Housing project in Sandy and the Town Center Green project in Clackamas.

Chuck also listed the Emergency Solutions Grant (ESG) program funding had increased by 17% in the 2014 year. The ESG program funds emergency shelter services for homeless youth at the Inn Home, homeless families at the Annie Ross House and survivors of domestic violence at the Clackamas Women's Services.

New measure of program performance includes economic impacts of these funds. The project in 2013 preserved or created almost 200 jobs in our community.

The public hearing was opened for public comment.

Monica Lodolini of the Madonna Center for parenting teens spoke on the need for housing for parenting teens. The Madonna Center served 150 teen parents and 175 children last year and many of those teens needed housing assistance. Monica was hoping that CDBG would be available for some type of program to house teens that were under 18 years old.

Patricia Aguilera also of the Madonna Center said that the Raise the Roof project was helping teens finds housing but many more needed help.

Valerie Aschbacher, President of the Madonna Center said that the services that exist are not helping parenting teens because these teens have been abandoned by their parents due to drug use or incarceration. The housing for parenting teens would go a long way toward helping these teen succeed in life.

Martha McLennan, Executive Director of Northwest Housing Alternatives spoke about getting 200 calls per month for housing assistance but they can only help 8 per month. Although jobs have been created in Clackamas County many of those jobs are low paying. 60% of those new jobs pay less than 60% of Area Median Income. Another factor in the cost of housing is the 17% increase in construction cost due to the current housing construction boom in our area.

Larry Alexander of the Boring Water District thanked Chuck Robbins for all his help with the projects in the Boring Water district. With CDBG funds the District has been able to install a new waterline and hydrant in the main street area and repair poor performing water well. The 750 customers in the 5 mile district appreciate the CDBG program. These grants have been a great benefit to the community because grants allowed for water rates to remain low. Larry is also president of the Boring Station Trailhead Park that will be requesting additional CDBG funds for playground equipment. A CDBG grant would help to complete the park.

Doug Dickson of the West Linn Adult Community Center asked that the board please support the CDBG grant for the expansion of the West Linn Adult Community Center for seniors. The center is out of room for the many programs and classes they offer. The seniors have been raising funds for 4 years and are working with the city. The Center classrooms and space is used by the city and by community groups.

There being no additional testimony or comments that public hearing was closed at 11:55 a.m.

G. Self Evaluation

Are major goals on target? Are the activities and strategies making an impact on identified needs? What indicators would best describe the results?

Clackamas County's performance in meeting the overall goals and objectives of the Consolidated Plan has been good. The overwhelming majority of expenditures have been in the highest priority category with emphasis on providing decent housing and suitable living environments.

Program Goals and Objectives

As evidenced in the tables in Section I and section II of this CAPER, the County has made good progress towards addressing its long-term housing and community development objectives. The revitalization of distressed neighborhoods, and the expansion and improvement of community services and facilities continues to be a program priority as does the development and preservation of affordable housing. During the reporting period the County continued to maximize its use of CDBG funds for **public services**:

- The Housing Rights and Resources program strives to ensure that low-moderate income citizens have the benefit of the protections of Fair Housing, landlord-tenant and other housing rights. The program's outreach efforts educate people on how to access those services. Activities include administrative and planning, outreach, information and referral, training, testing, enforcement, and legal assistance. Some of this work is done via subcontract with Legal Aid of Oregon and the Fair Housing Council of Oregon.
- Rent Well is a program designed to assist homeless and low-to-moderate income people overcoming barriers to accessing and retaining permanent housing. The program is operated by the Clackamas County Social Services Division and includes: classes designed to help clients accept responsibility for rental histories, build skills needed to become good renters and overcome barriers to permanent housing; provide rental assistance in the form of rapid re-housing payments, payments for application fees, security and cleaning deposits, and moving expenses, as well as a Landlord Guarantee component to compensate for damages done by Rent Well graduates; and an Outreach component to encourage landlord participation
- The HomeBase program provides assistance to individuals, couples, and families with children who are homeless or at risk of becoming homeless. Program participants reside in Clackamas County and must be at or below 30% of the Area Median Income. CDBG funds were limited to program

administration, operations and case management services. County General Funds provided financial assistance to prevent evictions and to rapidly re-house families.

Public Policies

The County has established, and continues to refine, its policies to minimize conflict associated with the development of special needs housing. The policies attempt to incorporate the basic principle of respect for legitimate concerns of the existing communities as well as the rights of prospective residents of a proposed development. A copy of the policy can be obtained by contacting the Clackamas County Community Development Division 503.655.8591.

The purpose of this policy is to outline a communication procedure whereby good relations may be achieved among neighbors, the community, public entities, developers and providers in County-funded assisted housing projects while observing the mandates of the Federal Fair Housing Act and other applicable regulations. To this end there are four primary objectives:

- To provide a resource for educational information on assisted housing projects to community members having an interest in or living close to the facility.
- To provide information on the Federal Fair Housing Act and its amendments (FHAA), confidentiality laws and other regulations that may pertain to the assisted housing facility and the release of project information.
- To establish guidelines and procedures for County staff to use in developing a project Communication Plan with neighbors and other stakeholders.
- To provide guidelines and procedures to facilitate problem solving of issues related to assisted housing projects.

Clackamas County has continued to refine its ordinance to address the removal of people and their possessions from unlawful campsites on public property. The addition to the Clackamas County ordinance addresses the notification and removal of persons and their possessions and brings the ordinance into line with state statutes.

Institutional Structure

Community Development Division provides consistent institutional structure in a variety of ways. CDD:

- Is the lead agency for the implementation of Clackamas County's Action Plan.
- Operates the Housing Rehabilitation Program, which uses CDBG and HOME funds to provide housing rehabilitation.
- Operates a down payment assistance program for first-time homebuyers.
- Provides funds for new housing development that is partially financed with HOME funds.
- Provides HOME funds to Community Housing Development Organizations for ongoing operating costs.
- Directly implements non-housing community development actions rather than passing that function through to sub-grantees.
- Monitors the performance of emergency shelter providers.
- Leads the community process and prepares the application and performance report for the Continuum of Care program.
- Administers the Homeless Management Information System for all Continuum of Care grantees and Emergency Solutions Grant subrecipients.
- Directly implements the Neighborhood Stabilization Program. This program provides funds to purchase foreclosed or abandoned homes and to rehabilitate, resell, or redevelop these

homes in order to stabilize neighborhoods and stem the decline of house values of neighboring homes.

Intergovernmental Cooperation

Clackamas County has continued to perform well in this area. The ongoing goal is to continue working to strengthen local nonprofit housing agencies, exploring the opportunities for expanding the existing model to increase the number of cooperative housing projects developed with and by these providers.

1. CDD continues to partner with the Social Services Division to develop program policies, guidelines and monitoring standards to allow local non-profit housing providers to operate and deliver Homelessness Prevention and Rapid Re-Housing Services. The program will contract with Northwest Housing Alternatives and Clackamas Women's Services to provide the following services:
 - Rent Subsidy Program – provision of short term (3 months) and medium term (up to 6 months) of rent subsidies to low- and moderate-income renters. The program would include client support, case management and short-term rental assistance.
 - Rapid Re-Housing Program –designed to provide housing placement, short-term rental assistance, case management and other support services to families with dependent children who have been living in emergency shelters or on the streets for at least seven days.
 - Counseling and Housing Stabilization Services – these include: Case Management, Outreach, Housing Search and Placement, Legal Services, and Credit Repair.
2. CDD administers a Housing Rehabilitation program for the Clackamas County Development Agency. This program is funded through proceeds generated from the North Clackamas Revitalization Area.
3. CDD has provided Project Management and contract administration services to the Clackamas County Community Health Division to assist with the remodel of the Hilltop Behavioral Health Center to make it more welcoming to clients.
4. CDD has participated in the redevelopment Easton Ridge Apartments. This is an 11-building affordable rental housing projects that is undergoing extensive rehabilitation. At a construction cost of over \$11 million the work includes residing and weatherization of all of the buildings, remodeling of all of the kitchens and bathrooms, and re-grading and landscaping of 2 courtyards.
5. CDD has provided funding to hire an HMIS System Administrator to administer the Homeless Management Information System (HMIS) in Clackamas County. This includes developing and implementing a Data Quality Plan, researching, identifying, coordinating and evaluating program performance, providing training to new database users and technical assistance to grantees.

Public Housing Improvements -- HACC has consistently passed its HUD inspections for Public Housing and continues to receive "High Performer" status for its management of Public Housing. Recently, HACC conducted a feasibility study for redevelopment. Public Housing Resident Services: HACC has been very proactive in finding and funding for outreach and services to assist its residents in helping them obtain self sufficiency. Some of the services included: Resident Association Events, Employment Workshops, Money Management Workshops, Youth Advocacy, Mentoring, Summer Lunch Program, After School Youth Programs, Tutoring and Homework Help, Independent Living Skills Training and In-Home Care Services for the Elderly and Disabled, Job Development and Referrals, Healthcare Education, Crime Prevention Programs, and Support Groups. Additionally, HACC works closely with other agencies such as the Oregon Food Bank, Boys and girls Club, Local School Districts and Community Schools, Local Law Enforcement Agencies, Portland State University MSW Program, Linfield-Good Samaritan School of Nursing, and area Hospitals and other Social Services.

Easton Ridge Apartments Rehabilitation: Clackamas County committed a total of \$860,000 in HOME funds for the rehabilitation of the Easton Ridge Apartments located on SE Causey Avenue in Happy Valley. The complex is owned by the Housing Authority but is not "public housing".

Sited on 8.8 acres, the affordable multi-family rental housing project consists of 264 one- and two-bedroom units in 11 three-story buildings and a single-story community building with a property management office. The apartments were constructed in 1989 and purchased by HACC in 1996. The renovation work will preserve the useful life of the project. Improvements are in these key areas: site drainage, exterior envelopes, interior ventilation, kitchens and bathrooms. At the close of this reporting period, the Easton Ridge project is 95% complete.

Project Selection -- Clackamas County has prepared a 5-year plan for its Community Development Block Grant. As part of the planning process, the County solicited project proposals and prepared a 3-year CDBG Project Summary. The 2012-2013 program year was the first year of the 3-year period. On November 2, 2011 CDD published a Request for Proposals for the 2012-2014 funding cycle. The closing date was December 15, 2011. The result was 68 proposals totaling almost \$14.1 million in requested CDBG and ESG funds.

In reviewing proposals for CDBG funding the County utilizes an intensive selection process that emphasizes communication, compromise, and consensus. Working closely with all of the project sponsors CD Staff helps to prioritize each project and evaluate actual project costs. With a commitment to local match funding participation the County ensures a high degree of leveraging and maximizes the impact CDBG funds have on local communities throughout the County.

The ESG program utilizes a more informal process. In program year 2013 ESG additional funds were available to support the Homeless Management Information System (HMIS) that also supports the Homeless Continuum of Care projects and reporting requirements. ESG funds for Shelter Operations are allocated to three (3) shelters currently in operation in Clackamas County on a percentage basis; 42% to Annie Ross House (family shelter), 42% to the Domestic Violence Shelter, 11% to The Inn - Homeless Youth Shelter, and 5% for Administration.

Barriers that may have a negative impact on fulfilling the strategies and the overall vision--

Funding: The primary barrier to fulfilling the goals and objectives of the Consolidated Plan is funding. As federal funds for housing and community development decreases, so do the possible solutions to address community needs. To combat this problem the County has aggressively pursued alternative funding sources.

The County has done a good job in stretching limited housing dollars and expanding services to its residents. The County has continued its aggressiveness in searching out alternative fund sources and will continue the efforts of supporting other jurisdictions and non-profit agencies in applying for funds for housing activities included in the 3-Year Strategy. CDBG funds carry a minimum 20% match requirement. During the 2013-14 program year the actual match percentage was 41%.

Reductions in the Federal Budget: Impacts of the recent recession are still being felt, and have been reflected in the changes to federal HUD allocations. The often large fluctuations in CDBG, HOME and ESG funding from one year to another has created a funding environment that is difficult to anticipate. Many programs and activities rely on renewable annual allocations. The trend for CDBG, HOME and ESG has been downward, and the benefit of modest increases to some programs has often been lost due to decreased funding to other programs. Furthermore, the unstable funding from one year to the next has made planning difficult for CDD as well as the agencies and organizations that are supported by our funds. It has also had a significant impact on our HOME funded affordable housing projects. These projects rely heavily on Low Income Housing Tax Credits for permanent financing. The current economic situation has resulted in lower tax credit prices. This has required that we increase the HOME investment in each project which means that fewer projects can be developed.

Local opposition: While there was no new opposition to local projects this is a continuing concern for project siting. The county continues to develop its process and communication plans to reduce NIMBY complaints on future projects.

Infrastructure: Another impediment, particularly in meeting the low income housing objective, is the lack of non-profit housing organizations in Clackamas County. Across the county these agencies have been in the forefront of housing development, and have been particularly successful in packaging various fund sources. The County continues to work at the expansion of this valuable resource. To that end, the County provides HOME CHDO operating funds to its Community Housing Development Organizations to ensure their viability.

Adjustments or improvements to strategies and activities that might help meet needs stated in Con-Plan more effectively -- The projects funded from the CDBG, HOME and ESG programs are meeting the major goals and objectives in the Consolidated Plan. However, the County will continue to seek input and participation from the community in making adjustments and improvements to strategies to more effectively meet the needs stated in the Con Plan.

H. Monitoring

Status of grant programs

The Letter of Credit for the County's CDBG program at the end of April 2014 was at an adjusted ratio of 1.21; HUD requires the ratio be below 1.5 by the end of April (See IDIS Report PR 56.) We continue to be below the required ratio because of the vigorous enforcement of the County's CDBG funding and expenditure guidelines. All projects are expected to be completed within a timely manner. Proposals, which appear unlikely to be completed within the prescribed timeline, will not be funded. Approved projects for which implementation has not reasonably progressed within 12 months of application approval will be reviewed for possible reprogramming of funds.

The HOME and Shelter Grant programs are on schedule with timely grant disbursements.

Clackamas County was a sub-recipient of Neighborhood Stabilization Program 1 funds and a consortium member for direct receipt of NSP2 funds. All of the NSP1 and NSP2 funds were obligated within the program deadlines. The programs are still active because the sale of homes through the Clackamas Community Land Trust has generated program income which we are using to create additional affordable housing units.

We continue to refine the data base for organizing and tracking all phases of a HOME project from development through monitoring. The system has greatly improved our ability to manage each individual project and the program in its entirety. The monitoring status report provides up to date information on which projects are due for monitoring. Bringing all of the information about HOME-funded projects into one central data base, has improved our ability to link the projects to the Action Plan, Consolidated Plan and the CAPER. The County also continues to participate in the statewide "Streamlining Compliance Initiative".

For the ESG program all funds are to be expended with 2 years of grant approval. On average these funds have been expended within 14 months.

If, in the opinion of the Community Development Director, reasonable progress is not being made on any CDBG, HOME or ESG funded project the Director notifies the project sponsor in writing. This notification sets forth the activities which have been delayed and the desired schedule for their completion, giving a reasonable time for the sponsor to act. The Director may terminate the project if the project sponsor fails to respond or fails to demonstrate a commitment to implement the project.

Are any activities or types of activities falling behind schedule? Are grant disbursement timely? Do actual expenditures differ substantially from letter of credit disbursements?

As a general rule it takes approximately 18 months to complete a Public Works project, 24 months to complete a Public Facilities project, and 36 months to complete an Acquisition/Public Facility Rehabilitation project. In many cases the proposed completion date in the Action Plan did not take into consideration this rule and under-estimated the amount of time necessary to complete a project. By this standard, Clackamas County has completed the majority of its CDBG projects in a timely manner. There are however, some projects that experienced exceptional problems which slowed their progress.

The reasons for these delays are varied. In general if a project is not proceeding due to delays on the part of the sponsor the project is cancelled and the funds reprogrammed.

With reductions in federal appropriations we have begun funding projects over multiple years. This has allowed us to continue to use CDBG funds in larger infrastructure and public works projects. The result is that funds remain unexpended longer and could potentially slow a project down by 1 year. However, during this reporting there were no slow moving projects.

I. Jobs Estimates

HUD's Office of Policy Development and Research (PD&R) has developed a methodology for estimating the number of jobs created based on the dollars expended on activities under the Community Development Block Grant and HOME programs. Using IMPLAN, an accepted data analysis tool, PD&R created a multiplier of Full Time Equivalent (FTE) jobs for different industry categories.

The FTE multipliers are:

1. Direct jobs, or staff employed by recipients of HUD funds,
2. Indirect jobs supported through the inter-industry purchases of intermediate supplies and services needed, and
3. Induced jobs, reflecting the spending by employees who earn income from businesses affected by the direct and indirect effects.

For example, direct jobs are contractors and subcontractors paid directly with HUD funds (including any matching or leveraged funds), indirect jobs are at building supply companies who provide supplies to the contractors or subcontractors, and induced jobs are at the grocery stores where contractor, subcontractor, and supplier employees spend their salaries.

Based on the expenditure of CDBG, HOME, and ESG funds (including all matching and leveraged funds included in the projects) Clackamas County estimates that 194.43 jobs were created or retained during the 2013-2014 program year. A break out is below:

<i>Industry</i>	<i>Direct Jobs</i>	<i>Indirect Jobs</i>	<i>Induced Jobs</i>
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Community food, housing, and other relief services	4.01	0.58	1.26
Construction of new residential permanent site SF and MF structures	0.47	0.35	0.42
Construction of other new nonresidential structures	14.40	9.57	13.80
Maintenance and repair construction of residential structures	52.98	16.94	32.57
Management, scientific, and technical consulting services	5.26	6.73	5.26
Non-housing Individual/Family Services	20.31	3.21	6.31
TOTAL ESTIMATED JOBS CREATED/RETAINED	97.43	37.37	59.63

IV. PROGRAM NARRATIVES

A. Community Development Block Grant Program

The purpose of the Community Development Block Grant (CDBG) program is to develop viable urban communities by providing decent housing and a suitable living environment and by expanding economic opportunities, principally for persons of low and moderate income. Clackamas County uses CDBG funds to:

- Revitalize distressed neighborhoods;
- Expand and improve community services and facilities;
- Expand and conserve the housing stock;
- Expand employment opportunities for low and moderate income persons; and
- Eliminate conditions detrimental to the community's health and welfare.

A review of the past year's performance demonstrated that the County has implemented and completed various projects throughout the County which have met those objectives.

Assessment of Relationship of CDBG Funds to Goals and Objectives

The assessment of how well the County used of CDBG funds in relation to the priorities, needs, goals, and specific objectives in the Consolidated Plan, particularly the highest priority activities is outlined in this CAPER in the Executive Summary and in Section II. Five-Year Plan Assessment of Progress. Detailed information about CDBG-funded projects and activities is included under each of the Con-Plan's specific goals and objectives.

Those sections also provide an evaluation of the progress made toward meeting goals for providing affordable housing using CDBG funds, and identify the number and types of households served.

Changes in Program Objectives / Amendments to the Consolidated Plan

This section describes the nature of and reasons for any changes in program objectives and how the County would change its program as a result of its experiences. During the program year the amendments listed below to the Consolidated Plan were executed.

Substantial Amendments to the Consolidated Plan were advertised as a public notice in the two Clackamas County papers of record: The Clackamas Review and the Lake Oswego Review. The notice included a contact number to request additional information and to submit comments on the proposed amendment. The comment period was open for 30 days from the date of publication. No comments were received.

2012 Community Stabilization Project – The project will provide three homeownership opportunities in targeted Neighborhood Stabilization Program (NSP) areas of Clackamas County. Proud Ground, a Community Housing Development Organization under the County's HOME Program, will acquire, rehabilitate and re-sell three single family homes to eligible low-income homebuyers under the community land trust model of homeownership. Each activity will use a combination of NSP and HOME funds. The total amount of HOME funds will be \$411,000. Funding will come from HOME Program Income generated during the 2012-13 Program. This is a continuation of an existing program.

Jackson Place Rehabilitation Project - This project is to rehabilitate a transitional housing apartment building in Oregon City by replacing the roof, replacing the siding, improving the drainage, improving the fire alarms, water heaters and heating system. The building improvements would increase the overall energy efficiency of the transitional housing program apartments and reduce the impact on the facility annual operations budget. This project is included in the Consolidated Plan as a 2014 project. This amendment will create a 2013 project by moving \$50,000 from the 2014 budget. Funds for this move will come from additional CDBG funds allocated by HUD. This move will have no impact on any project planned and budget in either the 2013 or 2014 program years.

Clackamas Cty. Service Dist. No.1 NCRA SHUAGP - This project would continue a residential sanitary sewer improvement program in the North Clackamas Revitalization Area (NCRA). project provides grants to low and moderate income residents to pay part of the construction costs to decommission their old cesspool sewers to hook up to the new Service District #1 sanitary sewer system. These improvements greatly improve the ground water and property values within this low-income neighborhood. This project is included in the Consolidated Plan as a 2014 project. This amendment will create a 2013 project by moving \$100,000 from the 2014 budget. Funds for this move will come from additional CDBG funds allocated by HUD. This move will have no impact on any project planned and budget in either the 2013 or 2014 program years.

Casa Hogar – This project to fund the construction or acquisition/remodel of a new emergency shelter for Latina survivors of domestic violence in Clackamas County is cancelled. \$60,000 of CDBG funds will be reprogrammed to the Contingency Fund.

Tenant Based Rental Assistance Program (TBRA) – The County proposes to use federal HOME funds to continue a rental assistance program. The TBRA program will be used to assist individual households who are homeless or at risk of becoming homeless. The assistance may be used for rent, utility costs, security deposits, and/or utility deposits. The maximum assistance is 24 months. \$80,130 of HOME funds will be moved from the 2012 program year to the 2013 program year. This move will have no impact on any project currently planned and budgeted in the 2013 program year.

Barlow Water Systems Improvements Phase 2 (2012/0015) –This public facility improvement project involves rehabilitation of the City of Barlow water reservoir system is cancelled. \$10,000 of CDBG funds will be reprogrammed to the Contingency Fund.

Annie Ross House Redevelopment (2012/0014) - This project to re-develop the Northwest Housing Alternatives (NHA) Milwaukie campus consisting of two office buildings, a homeless shelter, nine rental units, six transitional housing units, two Bridges to Housing units and one market-rate rental unit is cancelled. \$75,000 of CDBG funds from the 2012 program year will be reprogrammed to the Contingency Fund.

Annie Ross House Redevelopment (2013/0006) –This project to re-develop the Northwest Housing Alternatives (NHA) Milwaukie campus with two office buildings, a homeless shelter, nine rental units, six transitional housing units, two Bridges to Housing units and one market-rate rental unit is cancelled. \$125,000 of CDBG funds from the 2013 program year will be reprogrammed to the Contingency Fund.

The Terrace at Mt. Scott (2012/0024) - This project to construct 75 linear feet of new handrail along a ramp leading into the apartment complex is cancelled. \$11,220 of CDBG funds will be reprogrammed to the Contingency Fund.

Easton Ridge Apartment Remodel (2012/0025) – This project currently includes \$660,000 of HOME funds to assist in the renovation of the Easton Ridge Apartments, an affordable rental housing project owned and operated by the Housing Authority of Clackamas County. The 264-unit complex is located at 9009 SE Causey Avenue, Happy Valley, 97086. The renovation work includes improvements to site drainage, exterior envelopes, interior ventilation, kitchens and some bathrooms. The original scope of work included renovating 15% (40) of the bathrooms. The owner has requested an additional \$200,000 in HOME funds in order to renovate up to 20 more bathrooms. The 30-year Replacement Reserve plan called for the remaining 85% of the bathrooms to be renovated over a six-year period. Completing additional bathrooms by the end of construction will improve the long-term financial health of the property. \$200,000 of unprogrammed HOME Funds will be moved into this activity. The revised budget will be \$860,000.

Multi-Family Rental Housing (2013/0012) – This project included current and prior year HOME funds and specified two activities to be funded: \$500,000 for the rehabilitation and preservation of Ikoi-So Terrace, an affordable apartment complex in Oak Grove; and, \$700,000 set aside to develop A&D housing as part of the H3S Supportive Housing Development RFP. The A&D housing activity failed to obtain the primary financing required for development. The amendment proposes to increase the funding for Ikoi-So Terrace. \$750,000 of unprogrammed HOME Funds will be moved into this activity. These funds are intended as short term construction financing and will be repaid within 24 months of grant approval. The total budget for this activity will be increased to \$1,250,000.

Assessment of Efforts in Carrying Out Planned Actions

The assessment of how well the County pursued all resources indicated in the Consolidated Plan is outlined in this CAPER in Section I. Executive Summary and in Section II. Five-Year Plan Assessment of Progress. Detailed information about projects and activities under each of the Con-Plan's specific goals and objectives includes information on the sources of funding for each project.

Certification of Consistency with the Consolidated Plan: Thirteen (13) requests for Certification of Consistency with the Consolidated Plan were received during the 2013-2014 program year (listed below). Each request was evaluated and a "Certification of Consistency with the Consolidated Plan" was issued. The county pursued all resources and did not hinder consolidated plan implementation. No requests for certification were denied. Copies are available at the Community Development Division offices.

- Central City Concern – Chez Ami Apartments
- Clackamas County Social Services – HOPE Leasing
- Clackamas County Social Services – Jackson Transitional Housing
- Clackamas County Social Services – Ready to Rent Program
- Clackamas County Community Development – HMIS I, HMIS II and HMIS III.
- The Inn Home for Boys – Springwater Project
- The Inn Home for Boys – Avalon Project
- The Inn Home for Boys – Homesafe Project
- Clackamas Women's Services – Transitional Program
- Clackamas Women's Services – Permanent Supporting Housing Program
- Housing Authority of Clackamas County – Janssen Road Transitional Housing Program
- Housing Authority of Clackamas County – Shelter Plus Care
- Northwest Housing Alternatives – Rapid Re-housing Program

Use of CDBG Funds for National Objectives

CDBG funds were used exclusively for activities benefiting low/mod persons, for slum/ blight activities, or to meet urgent community needs.

Clackamas County complied with the certification to expend no less than 70% of its CDBG funding during the specified period by expending 100% of its funds on activities that benefited low/mod person.

National Objectives: A project must meet a National Objective in order to qualify for CDBG funds. Unless otherwise specified, projects are required to document how the expenditure of federal funds will benefit low- and moderate-income persons. For Area Benefit activities the project services areas are limited to low- and moderate income Block Groups as defined by HUD and the U.S. Census Bureau.

The activities in the tables below qualify as **Limited Clientele** activities. The table notes how compliance with the National Objective is documented.

#	Project Name	National Objective Documentation
1309	Housing Rights and Resources Program Rent Well/Countywide	These activities use a self-certification process to determine income. Over 70% of those requesting assistance were determined to be low and moderate income.
1280	Family Justice Center/Oregon City	Demographic and income records are maintained for all clients. Upon completion of the activities these records will be reviewed by County staff to ensure compliance with the National Objective.
1332	Jackson Place Rehabilitation/Oregon City	
1319	2013 Milwaukie ADA Ramps/Milwaukie	
1323	2013 Youth Shelter Care Expansion – Parrott Creek/Oregon City	
1325	River Road Head Start Kitchen/Milwaukie	The facility must document each student's qualification for participation in the Head Start program.

Presumed Benefit is a sub-category of *Limited Clientele*. Activities benefit clientele who are generally presumed to be low- and moderate-income persons. The following qualify as **Presumed Benefit** activities:

#	Project Name	National Objective Documentation
1280	Family Justice Center	Victims of Domestic Violence

Low-Mod Housing-- The various Housing Rehabilitation Programs managed by Clackamas County fall under this category. Those activities are shown in the table in Section II Five-Year Plan Assessment of Progress.

Low-Mod Area Benefit-- Projects that benefit Low-Mod Areas (LMA projects) are shown in Section II. Five-Year Assessment of Progress under goals C1 and C2. These are primarily infrastructure projects.

#	Project Name	National Objective Documentation
1242	Risley Ave/Kellogg Ave. Improvements	These projects benefit residents of census block groups with at least 46% low and moderate income residents. Clackamas County has a 46% LMI exception.
1317	2013 Bell Road Improvements	
1321	2013 NW Gladstone Infrastructure Rehab	
1243	2012 SE Canby Sidewalks	
1232	2012 Bell Road Improvements	
	2013 sandy Northside Sidewalk Infill	

Low/Mod Job Activities -- No activities were undertaken this reporting year.

Elimination of Slums/Blighted Conditions --Clackamas County undertook one CDBG activity under this national objective. The “**Save the Ermatinger House**” project is a historic renovation/restoration activity of a public facility and qualifies under the S/B national objective.

#	Project Name	National Objective Documentation
1322	2013 Save the Francis Ermatinger House	Elimination of Slums/Blight

Anti-displacement and Relocation – (for activities that involve acquisition, rehabilitation or demolition of occupied real property) No displacement/relocation activities occurred as a result of CDBG funded activities in the reporting period.

Planning and Administration activities are exempt from National Objective documentation. Those activities are shown in the table in Section II Five-Year Plan Assessment of Progress.

1. Program income received

Loans & Receivables, Reconciliation of Funds

A. PROGRAM INCOME	
1. Amount of program income reported that was returned to each individual <u>revolving</u> fund:	\$0
2. Amount repaid on each <u>float-funded</u> activity:	N/A
3. All other loan repayments broken down by the categories of housing rehabilitation, economic development, or other:	\$243,484
Single Unit Housing Rehabilitation	\$243,484
Reversion of Assets Repayment	\$0
Capital Improvement Loan Repayment	\$0
B. PRIOR PERIOD ADJUSTMENTS:	
1. Total Return of Grant Funds	\$0
C. LOANS AND OTHER RECEIVABLES	
1. Float-funded activities outstanding as of the end of the reporting period:	\$0
2. Total number of loans outstanding and principal balance owed as of the end of the reporting period:	
Single unit housing rehabilitation revolving fund:	
Loans outstanding-	8
Principal balance-	\$38,600
Single unit housing rehabilitation deferred payment:	
Loans outstanding-	209
Principal balance-	\$3,707,519
Rental Rehabilitation Loans – Deferred and Installment	
Loans outstanding-	34
Principal balance-	\$1,533,384
3. Amount of income received from the sale of property by parcel acquired or improved with CDBG funds:	\$0
4. Number and amount of loans in default and for which the balance was forgiven or written off during the reporting period:	0
5. Lump sum draw down agreement	0
D. RECONCILIATION OF LINE(S) OF CREDIT (LOC) AND CASH BALANCES TO UNEXPENDED BALANCE OF CDBG FUNDS SHOWN ON GPR	

UNEXPENDED BALANCE SHOWN ON GPR:	\$999,776
RECONCILIATION:	
ADD:	
LOC balance(s)	\$1,791,735
Cash on Hand:	
Grantee Program Account	\$0
Subrecipient Program Accounts	\$0
Revolving Fund cash balances	\$0
Section 108 Cash Balances	\$0
SUBTRACT:	
Grantee CDBG Program Liabilities	\$292,160
Subrecipient CDBG Program Liabilities	
TOTAL RECONCILING BALANCE:	\$1,499,575
UNRECONCILED BALANCE	\$0
E. CALCULATION OF BALANCE OF UNPROGRAMMED FUNDS	
Amount of funds available during the reporting period-	\$3,291,228
Add: Income expected but not yet realized-	\$0
	SUBTOTAL
	\$3,291,228
Less: Total budgeted amount	\$2,509,496
	UNPROGRAMMED BALANCE
	\$783,732

2. Prior period adjustments –

Where reimbursement was made this reporting period for expenditures (made in previous reporting periods) that have been disallowed, provide the following information:

None.

- a. Activity name and number as shown in IDIS.
- b. Program year(s) in which the expenditure(s) for the disallowed activity was reported.
- c. Amount returned to line-of-credit or program account.
- d. Total amount to be reimbursed and the time period over which the reimbursement is to be made, if the reimbursement is made with multi-year payments.

3. Loans and other receivables

- a. Principal balance for each float-funded activity outstanding as of the end of the reporting period and the date(s) by which the funds are expected to be received.

None.

- b. Total number of other loans outstanding and the principal balance owed as of the end of the reporting period.

251 loans

\$5,279,503 outstanding balance

- c. List separately the total number of outstanding loans that are deferred or forgivable, the

principal balance owed as of the end of the reporting period, and the terms of the deferral or forgiveness.

Loan Group	# of Loans	Interest Rate	Term	Outstanding Balance
1-Rental Rehab – CDBG	5	0%	DPL	\$572,902
3 - CDBG Rental Housing - Acquisition	2	3%	DPL	\$475,000.00
U - HACC Loan CDBG	10	0%	DPL	\$124,681
C – CHIP – CGBD	8	3% Amortized	20 years	\$38,600
D - DPL CDBG	207	0% or 3% Simple	DPL	\$3,684,413
T – NHS – CDBG	2	0% or 3% Amortized	DPL	\$23,106
R - Rental Rehab (old) – CDBG	17	0%	DPL	\$360,801
	251			\$5,279,503

The Deferred Payment Loans (DPL) as well as the other loans are due upon sale, transfer of title, change of use or refinance. No loans were forgiven.

- d. Total number and amount of loans made with CDBG funds that have gone into default and for which the balance was forgiven or written off during the reporting period.
None.
- e. A list of the parcels of property owned by the grantee or its subrecipients that have been acquired or improved using CDBG funds and that are available for sale as of the end of the reporting period.
None.

4. Lump sum agreements

None.

- a. Name of the financial institution.
- b. Date the funds were deposited.
- c. Date the use of funds commenced.
- d. Percentage of funds disbursed within 180 days of deposit in the institution.

Neighborhood Revitalization Strategies – The Sewer Hook-up Grant Program is not part of a HUD-approved neighborhood revitalization strategy; however, it is being operated within a county urban renewal district. The project is helping low- and moderate-income homeowners cover the cost of decommissioning septic systems and connecting to the new sewer system in the area.

- a) The table of activities in the “Five-Year Plan Assessment of Progress” Section of this CAPER includes activities funded with Neighborhood Stabilization Program funds. The purpose of the NSP was to stabilize neighborhoods by redeveloping foreclosed properties that might otherwise become blighted. Funds were targeted to census tracts that is that had the highest need based on the number of high-cost and highly leveraged loans, falling home values and high unemployment rate.

Housing Rehabilitation -- Single Family Residential Rehabilitation: The Housing Rehabilitation Program provides deferred payment loans to low-income homeowners for needed and critical repairs and grants for access to persons with physical disabilities. The program charges simple interest on the outstanding principal of the loan. Interest rates reflect market conditions and community needs. In the reporting period, the program offered:

- Home Access grants of up to \$5,000;
- Sewer Hook-Up grants up to \$7,500;
- Handicap Accessibility loans of up to \$15,000;
- Single Purpose loans of up to \$15,000;
- Exterior Repair loans of up to \$25,000; and
- Complete Repair loans of up to \$40,000

The interest rate was three percent (3%) per annum in the reporting period. Currently the program has a waiting list.

The Home Access Grants (HAG) covers the cost of removing barriers and improving access and safety in housing occupied by low-income persons with physical disabilities. Renters are eligible, depending on the availability of local funds.

The accomplishments of the Housing Rehab Program are reported under “Affordable Housing” in Section III of this CAPER.

B. HOME Investment Partnerships Program

The HOME Investment Partnerships Program (HOME Program) was created under Title II of the National Affordable Housing Act of 1990. The main purposes of the program are:

- To strengthen partnerships among all levels of government and the private sector, including for-profit and non-profit organizations, in the production of affordable housing;
- To expand the supply of decent and affordable housing, particularly rental housing, for very low-income and low-income Americans;
- To strengthen the abilities of state and local governments to design and implement strategies for achieving an adequate supply of decent, affordable housing.

1. Relationship of HOME Funds to Goals & Objectives

The County’s HOME funds, and any Program Income received, are used on projects that address the most pressing housing needs for low-income persons and families identified in the County’s Consolidated Plan. The County demonstrated its commitment to implement the goals and strategies of the Consolidated Plan and participated in the development of affordable housing projects by supporting applications from other agencies, groups and organizations that further these goals.

HOME funds were distributed to implement projects identified in current and previous Action Plans, as amended and were distributed among the following Consolidated Plan goals:

- ***H-1: Increase and improve housing that is affordable to renters***
 - Rental housing for low-income individuals and families, including persons with disabilities and the elderly
- ***H-2: Stabilize existing homeownership and provide opportunities for new homeowners***
 - Affordable homebuyer housing for low-income homebuyers
 - Direct assistance to low-income homebuyers
- ***HS-1 Stabilize the lives of families and individuals who are in crisis and***
 - Tenant Based Rental Assistance (This activity also supports goal of H-3: Reduce homelessness and meet the housing needs of special needs populations. The activity appears in the table in Section II only once, under the primary goal, to avoid duplication.)
- ***P&A – Planning and administration***

- Operating funds to strengthen the capacity of the County's three CHDO's:
 - Northwest Housing Alternatives;
 - Clackamas Community Land Trust (now Proud Ground); and
 - Caritas Community Housing Corporation.

The amount of HOME funds committed and expended in the reporting period is shown in this CAPER in the table in Section I under "Summary of Resources and Distribution of Funds". Details about open and completed activities can be found in Section II: Five-Year Assessment of Progress.

2. The HOME Match Report

Form HUD-40107-A is included in Vol.2.

3. MBE/WBE Report

Part III of HUD form 40107 reports contracts and subcontracts with Minority Business Enterprises (MBEs) and Women Business Enterprises (WBEs). It is included in Vol.2.

4. Assessments

On-site Inspections of Rental Housing:

Clackamas County conducts on-site inspections of its HOME-funded multi-family rental housing projects in accordance with 24 CFR 92.504(d) and provides timely information to project owners about relevant issues such as changes in the HOME rent and income amounts. The monitoring schedule during the reporting year was based on the then current HOME rule that required projects to be monitored annually, every two years or every three years, depending on the total number of units in the project.

The requirements for onsite monitoring are followed to determine that compliance with HOME property and affordability standards are maintained.

To maximize the efficiency of the monitoring process, Clackamas County continues to participate in a regional Streamlining Compliance Initiative (SCI) to establish a coordinated, streamlined approach to monitoring among the various funders. The process incorporates web-based databases and uniform property inspections. The goal is for the monitoring process to be more efficient for lenders and owners and less disruptive to the tenants.

The SCI work group has refined a physical inspection standard that incorporated the Uniform Physical Conditions Standards (UPCS) used by the federal tax credit program and the property standards of the HOME Program. Both of the County's Rehab Advisors were trained and certified in the enhanced UPCS/HQS methodology.

The SCI monitoring protocol steps:

1. Send a letter to the owner to obtain information and confirm a date for the monitoring visit;
2. Conduct physical inspections to determine compliance with HOME property standards;
3. Interview property management staff;
4. Review tenant and project files;
5. Send follow-up letter to notify owners of any deficiencies; and
6. Conduct follow-up visits if needed to verify that deficiencies have been corrected.

The following table shows on-site inspections conducted in 2013-14 program year and identifies areas where there were findings.

PROJECT	DATE	AREAS THAT HAD FINDINGS*		
		Site and/or Building Exterior	Common Areas and/or Building Systems	HOME Units
Acadia Gardens	7/17/2013	Yes	No	No
Casa Verde	7/15/2013	Yes	Yes	Yes
The Charleston	8/22/2013	Yes	Yes	Yes
Chez Ami	8/21/2013	No	Yes	Yes
Clackamas Apartments	10/29/2013	No	Yes	Yes
Creekside Woods	7/22/2013	Yes	Yes	No
Fenton Rondel Court	8/17/2013	Yes	Yes	Yes
Fisher Ridge Apartments	9/17/2013	No	Yes	Yes
Jackson Place Transitional	5/16/2013	Yes	Yes	Yes
Meadowlark Apartments	9/17/2013	No	No	No
Mt. Scott Terrace	7/17/2013	Yes	No	Yes
Plaza Los Robles	10/07/2013	No	Yes	Yes
Renaissance Court	10/10/2013	No	Yes	Yes
Sandy Vista	9/30/2013	Yes	Yes	No
Town Center Station	7/17/2013	No	No	Yes
Whispering Pines	8/28/2013	No	Yes	Yes
Weidemann Park Apartments	8/14/2013	Yes	Yes	Yes

Findings and trends:

- **Site and Building Exteriors:** The inspection protocols developed by the Streamlining Compliance Initiative are helping owners identify problem areas, such as building envelope issues, before they cause further damage. Many findings have to do with vegetation and soil buildup on exterior siding, failing fencing, deteriorated play equipment and defects from normal wear and tear.
- **Common Areas and Building Systems:** This category includes boilers, central heating and other building-wide systems. It also includes lobbies, hallways and laundry areas. Findings were fairly minor (loose fixtures, deteriorating non-LBP paint)
- **Units:** Most of the items noted are very small such as a missing sink stopper or missing light bulb. The bathroom areas in several of the complexes needed caulking repairs and corrections to remedy slow drains. Many tenants store items in a manner that raise safety concerns, e.g. blocking egress or placing chairs too close to a heat source.
- **Files:** If a lease contains any of the terms prohibited in 24 CFR Part 92, the tenants in the HOME unit must sign a HOME Addendum every time the tenant signs a new lease. We are requiring the owners to download the HOME Lease Compliance form on OHCS' website.

Homebuyer Monitoring: In January 2014, CDD sent monitoring letters to 90 homeowners who had received loans to assist with down payment and closing costs and were still within the affordability period. All homeowners signed and returned the confirmation that they still reside in the home. The 89 letters included all sources of funding, CDBG, HOME, NSP, NCRA.

TBRA Monitoring: Northwest Housing Alternatives acts as a subrecipient for the TRBA Program. On September 4, 2013, Community Development staff reviewed the client files and the overall program

operations of the Tenant Based Rental Assistance Program for the 2012-13 program year. CD staff reviewed the Subrecipient Agreement, the TBRA Program Guidelines, the list of documents being used, the referral procedures, the tenant selection criteria, the income limits being used, the rent standard being used and three client files. Based on the review, staff concluded that the program is being operated according to the agreement and the guidelines.

5. Assessment of Affirmative Marketing Actions

The County has established an Affirmative Marketing Policy for HOME-assisted units to comply with the requirements at 24 CFR Part 92.351 and to further its commitment to non-discrimination and equal opportunity in housing. The policy is part of every HOME Agreement for multifamily rental housing projects. The policy outlines the affirmative marketing procedures and practices to be used by the County and project owners to inform and solicit applications from persons in the housing market who are not likely to apply for such housing without special outreach.

The policy requires that the Equal Housing Opportunity logo be displayed on HOME program related documents and publications to inform the public, owners, and potential tenants about fair housing laws. Owners of rental units are encouraged to advertise vacant units in www.housingconnections.org, newspapers of general circulation, radio, television, brochures or flyers and to utilize the Housing Authority, fair housing groups, housing counseling agencies and the County's Social Service information and referral department to publicize unit vacancies or otherwise provide information to potential tenants. The policy requires that owners maintain file records containing all marketing efforts, which are made available for inspection.

The County assesses the success of its Affirmative Marketing Policy annually in two ways:

1. By analyzing the results of new projects that were completed in the program year.

Prior to committing HOME funds for a housing project, the County reviews the proposed Affirmative Marketing Plan. When the project is completed, the project owner completes the tenant information on the Form HUD-40097. The race and household characteristics of the tenants are compared to the County's general population by using data from the US Census 2006 American Community Survey for Clackamas County. Such comparisons take into account projects that are targeted to specific groups such as disabled persons or farmworkers.

2. By reviewing the ongoing Affirmative Marketing efforts of project owners during the on-site inspections. During the on-site inspections:
 - County staff interview project staff to determine compliance with County policy;
 - Visually assess whether Fair Housing marketing posters are prominently displayed; and
 - Review the project's marketing file to assess whether the advertising and other forms or outreach are following the County's plan and the project own plan.

During reporting period, no projects were found to be out of compliance with the Affirmative Marketing Policy.

6. Outreach to Minority & Women-Owned Business (MBE/WBE)

In accordance with Executive Orders 11625, 12432 and 12138, the County has developed a policy to encourage the use of Minority- and Women-owned Business Enterprises (MBE/WBE) in HOME-funded projects. The policy outlines steps the County takes to ensure, to the maximum extent possible, that small MBE/WBE's are used whenever possible and economically feasible.

The majority of the County's HOME-funded multi-family rental projects are owned by non-profit organizations that are strongly committed to serving minorities and using MBE/WBE contractors.

All HOME Agreements include the County's MBE/WBE policy. Project owners certify that they will:

1. Include, to the maximum extent feasible, the use of MBE/WBE in providing supplies, professional and construction services; and
2. Maintain statistical data and identify jobs which have been bid by MBE/WBE.

The County assesses the success of its MBE/WBE Policy annually by analyzing the results of the projects that were completed in the program year. The project owner completes the HOME Program Annual Performance Report Form HUD-40107 (Part III) which quantifies the number and dollar value of all contractors and subcontractor who worked on the project. Form HUD-40107 is included in Vol. 2.

C. Emergency Solutions Grant (ESG)

1. Assessment of Relationship of ESG Funds to Goals & Objectives

Clackamas County demonstrated its commitment to implement the goals and strategies of the Consolidated Plan by using its Emergency Solutions Grant (ESG) program to provide funds for homeless programs and services.

The Clackamas County ESG program funds the Homeless Management Information System (HMIS) for ESG reporting and three (3) agencies that provide ESG Emergency Shelter Operations Services.

The three agencies funded for Emergency Shelter operations and services provide three 3 types of emergency shelter services: The Inn operates a youth emergency shelter, Clackamas Women's Services operates an emergency shelter for survivors of domestic violence (DV), dating violence, or stalking and Northwest Housing Alternatives operates the Annie Ross House Emergency shelter for families.

Per the CPD Notice CPD 13-06 dated August 22, 2013 ESG information has been entered into an IDIS report which is attached. Client data has been entered into the CoC Homeless Management Information System (HMIS) and will be reported to HUD

2. Monitoring

As part of the ESG Agency Grant Agreement certifications, the County has worked with the three shelters to incorporate into their plan provisions for the participation of homeless persons in the policy-making functions within the shelters, and for homeless individuals and families to be involved in providing work or services to the facility.