



HOMES FOR GOOD BOARD OF COMMISSIONERS MEETING

Wednesday, July 24th, 2024

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AGENDA

Homes for Good Housing Agency

BOARD OF COMMISSIONERS

Location of the meeting:

Homes for Good Administrative Building
100 W 13th Avenue
Eugene, OR 97401



Zoom

This meeting will be conducted in person with option to join via public video call and conference line (see details below).

Wednesday, July 24th, 2024, at 1:30pm

The July 24th, 2024, Homes for Good Board of Commissioners meeting will be held at the Homes for Good Administrative Building. It will also be available via a public video call with dial-in capacity. The public has the option to participate in person or by joining via video call or conference line.

Join Zoom Meeting:

<https://us02web.zoom.us/j/88069630164>

1. PUBLIC COMMENTS

Maximum time 20 minutes: Speakers will be taken in the order in which they sign up and will be limited to 3-minutes per public comments. If the number wishing to testify exceeds 10 speakers, then additional speakers may be allowed if the chair determines that time permits or may be taken at a later time.

PLEASE NOTE: *The Homes for Good Board of Commissioners is a policy advisory body to Homes for Good and is not designated to resolve issues in public meeting. The Board will not discuss or make decisions immediately on any issue presented.*

2. COMMISSIONERS' RESPONSE TO PUBLIC COMMENTS AND/OR OTHER ISSUES AND REMONSTRANCE (2 min. limit per commissioner)

3. ADJUSTMENTS TO THE AGENDA

4. COMMISSIONERS' BUSINESS

5. EMERGENCY BUSINESS

6. EXECUTIVE SESSION

7. ADMINISTRATION

- A. Executive Director Report
- B. Quarterly Excellence Awards

8. CONSENT AGENDA

- A. Approval of 06/26/2024 Board Meeting Minutes

9. PRESENTATION

Berman Hopkins Agency Audit Exit Review
(Laura Ann Pray, Berman Hopkins) (Estimated 30 minutes)

10. ORDER 24-24-07-01H

In the Matter of Approving the Audit Plan of Action for Oregon Secretary of State Audits Division
(Beth Ochs, Rent Assistance Director & Eileen Lahey, Finance Director) (Estimated 20 minutes)

11. PRESENTATION

Homes for Good Fiscal Year 2025 Budget Timeline Overview
(Ela Kubok, Deputy Director) (Estimated 10 minutes)

12. ORDER 24-24-07-02H

In the Matter of Approving the 2024-2028 Capital Fund Program Five-Year Action Plan
(Jared Young, Contract Administrator) (Estimated 15 minutes)

13. PRESENTATION

Homes for Good Hate & Bias Policy
(Bailey McEuen, Human Resources Director) (Estimated 15 minutes)

14. PRESENTATION

Strategic Equity Plan Year II Review
(Equity Strategy Team) (Estimated 30 minutes)

15. OTHER BUSINESS

Adjourn.



EXCELLENCE AWARD

JULY 2024



EXCELLENCE AWARD

JULY 2024

AMANDA IS A SHINING EXAMPLE OF EXCELLENCE IN OUR AGENCY. DESPITE BEING A RELATIVELY NEW MEMBER OF OUR TEAM, SHE HAS ALREADY MADE A SIGNIFICANT IMPACT BY CONSISTENTLY THRIVING IN OUR FAST-PACED ENVIRONMENT AND STAYING BUSY EVEN DURING DOWNTIME. HER EXCEPTIONAL WORK ETHIC, ATTENTION TO DETAIL, AND DEDICATION TO HER ROLE HAVE BEEN INSPIRING AND IMPRESSIVE.

AMANDA'S MENTORSHIP OF HER COLLEAGUES HAS BEEN PARTICULARLY NOTEWORTHY, AS SHE HAS HELPED FOSTER A CULTURE OF EXCELLENCE BY SHARING HER EXPERTISE AND OFFERING GUIDANCE AND SUPPORT. HER COMMITMENT TO OUR AGENCY'S MISSION AND VALUES IS EVIDENT IN EVERYTHING SHE DOES, AND SHE HAS BEEN STEADFAST IN HER APPROACH EVEN WHEN FACED WITH HIGHER WORK VOLUMES OR DIFFICULT CONVERSATIONS.

THROUGH HER OUTSTANDING PERFORMANCE, AMANDA HAS DEMONSTRATED EXCEPTIONAL LEADERSHIP SKILLS, ATTENTION TO DETAIL, AND A STRONG WORK ETHIC. HER ABILITY TO ADAPT TO CHANGING CIRCUMSTANCES AND PIVOT WHEN NECESSARY HAS ALLOWED HER TO THRIVE IN A DYNAMIC ENVIRONMENT, MAKING HER AN INVALUABLE ASSET TO OUR TEAM. WE ARE GRATEFUL TO HAVE AMANDA ON OUR TEAM AND LOOK FORWARD TO SEEING HER CONTINUED GROWTH AND SUCCESS.

NATALIE DYBENS
RENT ASSISTANCE PROGRAM MANAGER



**EXCELLENCE
AWARD**

JULY 2024



EXCELLENCE AWARD

JULY 2024

SINCE BRENDA JOINED THE PROPERTY MANAGEMENT TEAM TWO YEARS AGO, SHE HAS MADE A HUGE IMPACT ON BOTH HER COWORKERS AND THE COMMUNITIES SHE SERVES AS ASSISTANT PROPERTY MANAGER. BRENDA'S ABILITY TO MAINTAIN AN OPTIMISTIC AND JOYFUL Demeanor, EVEN WHEN FACED WITH DIFFICULT CIRCUMSTANCES AND CHALLENGES, MAKES HER AN IDEAL COWORKER. FURTHER, SHE HAS A KNACK FOR MEETING RESIDENTS WHERE THEY ARE AT, TREATING THEM WITH RESPECT AND MAKING SURE THAT THEY HAVE A PLACE THEY CAN PROUDLY CALL HOME.

TRAVIS BAKER
PROPERTY MANAGER

MINUTES

Homes for Good Housing Agency

BOARD OF COMMISSIONERS



Wednesday, June 26th, 2024, at 1:30 p.m.

Homes for Good conducted the June 26th, 2024, meeting in person at the Homes for Good administrative building and via a public video call with dial-in capacity. The public was able to join the call, give public comments, and listen to the call.

CALL TO ORDER

Board Members Present:

Michelle Thurston

Justin Sandoval

Pat Farr

Kirk Strohman

Chloe Chapman

Joel Iboa

Destinee Thompson

Board Members Absent:

Heather Buch

Larissa Ennis

Quorum Met

1. PUBLIC COMMENT

None

2. COMMISSIONERS' RESPONSE TO PUBLIC COMMENTS AND/OR OTHER ISSUES AND REMONSTRANCE

None

3. ADJUSTMENTS TO THE AGENDA

None

4. COMMISSIONERS' BUSINESS

Pat Farr noted that he will need to leave the meeting early due to a conflicting commitment.

5. EMERGENCY BUSINESS

None

6. EXECUTIVE SESSION

None

7. ADMINISTRATION

A. Executive Director Report

Jacob Fox discussed the onboarding of Homes for Good's new Real Estate Development Director, Audrey Banks. She has worked in the public sector within municipal governments for many years, experience in the local real estate space and a master's degree in public administration from the University of North Carolina.

The Housing Choice Voucher Program (HCV) is in "shortfall" status. Shortfall is when the financial liability of a program exceed the amount of funds available. In response the Department of Housing & Urban Development (HUD) assigns a team to assess the program, make recommendations and typically increase monthly funding allocations. At this point in the time the HUD Shortfall Team will be analyzing the data that Homes for Good provides to review the Housing Assistance Payment (HAP) and Administrative Fee expenditures.

The audit is on track to be submitted by Sunday, June 30th, 2024. Depending on the findings and if there are deficiencies this could impact future development projects such as Ollie Court. Investors and lenders will want to review the submitted audit for due diligence purposes.

Jacob Fox along with other leaders hosted a Eugene Chamber Community Solutions Summit event to discuss the work the Building Home Action team has conducted in determining the needs for middle and lower middle-income housing throughout Lane County.

Discussion Themes

- Plan to engage business leaders with board support
- Appreciation for summit presentation

8. CONSENT AGENDA

A. Approval of 05/22/2024 Board Meeting Minutes

Vote Tabulations

Motion: **Kirk Strohman**

Second: **Pat Farr**

Discussion: *None*

Ayes: **Michelle Thurston, Justin Sandoval, Kirk Strohman, Chloe Chapman, Joel Iboa, Pat Farr , Destinee Thompson**

Abstain: *None*

Excused: **Larissa Ennis, Heather Buch**

The 06/26/2024 Consent Agenda was approved [7/0/2]

9. PRESENTATION: Asset Portfolio Repositioning Analysis by Geller Silvis & Associates

Geller Silvis & Associates Presenting

Overview

Homes for Good has 39 apartment communities, 27 of which are primarily managed by third-party property management companies. Like any in the affordable housing industry, these properties struggled during the global pandemic, placing increased stress on already tight operating budgets. Homes for Good has had to make owner cash contributions to several properties to maintain ongoing operations.

The Asset Repositioning Analysis by GSA studies each property's debt cash flow, regulatory requirements, and other factors to provide evaluation tools for Homes for Good leadership and board to guide future decision making for the portfolio.

[see: [GSA Presentation](#)]

Discussion Themes

- What refinance would look like
- Timeline
- Debt services issues with refinance
- Rent increase limitations

No action needed.

10.ORDER 24-26-06-01H: In the Matter of Approving the PHA Annual Plan, MTW Supplement & 5-Year Plan

Rent Assistance Director, Beth Ochs Presenting

Overview

Homes for Good is required to submit an Annual Plan and Five-Year Plan to HUD. The Annual Plan includes a Move to Work (MTW) Supplement. This will allow for the transition to a triennial income review cycle. This change will result in decreased administrative costs which will offset the anticipated increased Housing Assistance Payment (HAP) costs.

Discussion Themes

- Feedback received by the public and/or from RAB

Vote Tabulations

Motion: **Kirk Strohman**

Second: **Destinee Thompson**

Discussion: *None*

Ayes: **Michelle Thurston, Justin Sandoval, Kirk Strohman, Chloe Chapman, Joel Iboa, Destinee Thompson**

Abstain: *None*

Excused: **Larissa Ennis, Heather Buch, Pat Farr**

ORDER 24-26-06-01H was approved [6/0/3]

11. ORDER 24-26-06-02H: In the Matter of Approving Year III of the Strategic Equity Plan

Equity Strategy Team Presenting

Overview

Homes for Good in 2020 established an internal Equity Strategy Team (EST) to further diversity, equity, and inclusion goals for the Agency. As a result, the EST developed a Strategic Equity Plan (SEP). Each year the goals and tactics of the SEP are reviewed by the SEP, the board and staff to plan for the following year.

The biggest changes in this years' plan were to create more measurable goals to increase realistic outcomes between July 2024 – June 2025.

Discussion Themes

- Rural tactics
- Working definition of “underserved communities”
- Ensure when telling the human story, the folks we talk about are present to speak up
- Earned media
- Spotlight Homes for Good media appearances in Executive Director report
- How many Local Preferences Homes for Good has
- Urban canopy considerations
- Long-term climate resiliency goals

Vote Tabulations

Motion: **Chloe Chapman**

Second: **[Name]**

Discussion: *None*

Ayes: **Michelle Thurston, Justin Sandoval, Kirk Strohman, Chloe Chapman, Joel Iboa, Destinee Thompson**

Abstain: *None*

Absent: **Larissa Ennis, Heather Buch, Pat Farr**

ORDER 24-26-06-02H was approved [6/0/3]

12. OTHER BUSINESS

None

The meeting adjourned at 3:29 p.m.

Minutes Taken By: Jasmine Leary Mixon



BOARD OF COMMISSIONERS AGENDA ITEM

BOARD MEETING DATE: 07/24/2024

AGENDA TITLE: Berman Hopkins Agency Audit Exit Review

DEPARTMENT: Finance

CONTACT : Jasmine Leary Mixon

EXT: 2501

PRESENTER: Laura Anne Pray - Berman Hopkins Partner

EXT: --

ESTIMATED TIME : 30 minutes

- ORDER/RESOLUTION
- PUBLIC HEARING/ORDINANCE
- DISCUSSION OR PRESENTATION (NO ACTION)
- APPOINTMENTS
- REPORT
- PUBLIC COMMENT ANTICIPATED

Approval Signature

EXECUTIVE DIRECTOR:

A handwritten signature in black ink, appearing to be "JAF", is written over a horizontal line.

DATE: 07.18.2024

LEGAL STAFF :

DATE:

MANAGEMENT STAFF:

DATE:



BOARD OF COMMISSIONERS AGENDA ITEM

BOARD MEETING DATE: 07/24/2024

AGENDA TITLE: In the Matter of Approving the Audit Plan of Action for Oregon Secretary of State Audits Division.

DEPARTMENT: Rent Assistance Division & Finance

CONTACT : Beth Ochs and Eileen Lahey **EXT:** 2547

PRESENTER: Beth Ochs and Eileen Lahey **EXT:** 2547

ESTIMATED TIME : 20 minutes

- ORDER/RESOLUTION**
- PUBLIC HEARING/ORDINANCE**
- DISCUSSION OR PRESENTATION (NO ACTION)**
- APPOINTMENTS**
- REPORT**
- PUBLIC COMMENT ANTICIPATED**

Approval Signature

EXECUTIVE DIRECTOR:

A handwritten signature in black ink, appearing to be "JAF", is written over a horizontal line.

DATE: 07.18.202

LEGAL STAFF :

DATE:

MANAGEMENT STAFF:

DATE:



HOMES FOR GOOD MEMORANDUM

TO: Homes for Good Board of Commissioners

FROM: Beth Ochs, Rent Assistance Division Director and
Eileen Lahey, Finance Director

TITLE: In the Matter of Approving the FY23 Financial Audit Significant Deficiency Plan of Action and the Moving to Work Eligibility Finding Plan of Action

DATE: July 24, 2024

MOTION:

Seeking Board Approval to approve the FY23 Financial Audit Significant Deficiency Plan of Action and the Moving to Work Eligibility Finding Plan of Action.

DISCUSSION:

A. Issue

The FY23 Audit was completed on June 28, 2024, by Berman Hopkins CPA's and Associates, LLP (B&H). During the audit of the Agency's financial statements, adjustments were needed to properly report the financial statements in accordance with generally accepted accounting principles. Certain accounts had not been properly reconciled and corrective entries were not readily available. Significant adjustments were necessary for several audit areas. The general ledger and the unaudited data submitted to REAC required numerous and material audit adjustments that delayed the audit completion. This audit documented a significant deficiency in the financial data submitted to the U.S. Department of Housing and Urban Development Real Estate Assessment Center (REAC). With audit procedures applied, significant adjustments were identified to properly reflect the financial data.

In addition, this audit documented a finding in the Moving to Work Eligibility Process. 86 files were randomly selected from a pool of approximately 3900. 7 files were noted to have deficiencies.

B. Background

The following key events are relevant background for the Significant Deficiency in Internal Control Finding:

- We had this same Significant Deficiency in Internal Control finding during the FY22 Audit.
- B&H has communicated that we have made improvements to internal controls over financial functions/process from FY22, however, more improvements to these controls will need to continue through FY24 and FY25.
- We still have not implemented a financial month end close, which if we had implemented in FY 23 we would have likely avoided this finding.

The following key events are relevant background for the Moving to Work Eligibility Finding:

- Eligibility documentation was not retained as required by Standard Operating Procedures.

- COVID waivers resulted in Housing Quality Standards Inspections (HQS) being paused for two years.
- A portion of Housing Quality Standards Inspections have been contracted out and adequate tracking of their completion was not conducted.

C. Analysis

We were able to identify the following causes related to the significant deficiency and the finding.

1. Staff were not following Standard Operating Procedures. Accounts for 4 files flagged for audit.
 - a. Not consistently utilizing checklists for file action items
2. Supervisory staff were not adequately tracking the completion of HQS Inspections. Accounts for 2 files flagged for audit.
3. Checklists are not adequate for households who have additional family members added. Accounts for 1 file flagged for audit

D. Furtherance of the Strategic Equity Plan

This Board Order does not directly connect to the Strategic Equity Plan.

E. Alternatives & Other Options

There are no alternatives to the Oregon Secretary of State Audits Division requirement to submit a Plan of Action for the FY23 Financial Audit Significant Deficiency and the MTW Eligibility Finding.

F. Timing & Implementation

The timing and implementation details are outlined in the attached Plans of Actions to this Board memo.

G. Recommendation

Homes for Good recommends the board approve this board order.

H. Follow Up

Homes for Good staff will provide frequent updates to the Board Finance Committee associated with the efforts to address these audit findings.

I. Attachments

- FY23 Financial Audit Significant Deficiency Plan of Action
- FY23 Moving to Work Eligibility Finding Plan of Action



Audit Report, Agreed-upon Procedures (AUP) Report and Financial Statements, or Review Report

Are you submitting a(an):
Audit Report

Municipal corporation
Homes for Good Housing Agency

Municipal customer number

Fiscal year end date
9/30/2023

Firm Name
Berman Hopkins Wright & LaHam, CPAs and Associates, LLP

Your name
Laura Pray

Your email
pray@bermanhopkins.com

Additional email to receive copy of this submission
elahey@homesforgood.org

Additional email to receive copy of this submission
jfox@homesforgood.org

Attach Audit Report, AUP and Financial Statements, or Review Report here:
Homes For Good Housing Agency 2023 Final FS.pdf

Did the auditor communicate deficiencies?
Yes

Would you like to submit your plan of action now?
No

A Plan of Action as adopted by the governing body must be filed within 30 days of your report submission. You can email to municipalfilings.sos@sos.oregon.gov or mail to:

Audits Division
255 Capitol St. NE
Salem OR 97310

You may proceed by clicking Submit below to submit your report without the Plan of Action at this time.

Comments or additional information

Keep me updated via email on Municipal Audit Program News.
Yes



July 24, 2024

Oregon Secretary of State
Audits Division
255 Capitol St. NE, Ste 500
Salem OR 97310

Plan of Action for Sample Municipality

Homes for Good Housing Agency respectfully submits the following corrective action plan in response to the deficiency/finding reported in our audit for fiscal year ending September 30, 2023. The audit was completed by the independent auditing firm Berman Hopkins CPAs and Associates, LLP and reported the deficiencies listed below. The plan of action was adopted by the governing body at their meeting on July 24, 2024, as indicated by the signature below.

Findings are listed below, including the adopted plan of action and timeframe for each.

1. Finding #1 (2023-01)
 - a. Type of Finding: Financial Reporting, Significant Deficiency in Internal Control
During our audit of the Agency’s financial statements, adjustments were needed to properly report the financial statements in accordance with generally accepted accounting principles. Certain accounts had not been properly reconciled and corrective entries were not readily available. Significant adjustments were necessary for several audit areas. The general ledger and the unaudited data submitted to REAC required numerous and material audit adjustments that delayed the audit, and therefore REAC could not provide proper timely financial oversight. The Agency should continue to develop and implement internal controls over both internal and external reporting, and the year-end close process to ensure reporting remains accurate and timely, with any unexpected financial data being investigated and corrected before it is reported. The Agency should consider additional staff training on development activities and its financial software.
 - b. Plan of Action and Timeframe for Implementation

Action	Timeframe	Responsible Person
Enter GL Opening Balances into new software, Yardi	July 31, 2024	Eileen Lahey, Finance Director
Utilize Clifton Larson Allen, CPA, and any available HUD training regarding FDS classifications & GL Account Crosswalk	July 31, 2024	Eileen Lahey, Finance Director



Complete Year-to-Date period close, October 2023 thru June 2024	August 15, 2024	Eileen Lahey, Finance Director
Complete Month-end close for July 2024	August 30, 2024	Eileen Lahey, Finance Director
Complete Month-end close for August 2024 and thereafter by last business day of the following month	September 30, 2024	Eileen Lahey, Finance Director
Complete FY24 Year-end Close	November 15, 2024	Eileen Lahey, Finance Director
Utilize Clifton Larson Allen, CPA to ensure compliance with relevant and new FASB and GASB rules	November 15, 2024	Eileen Lahey, Finance Director

2. Finding #2 (2023-02)

a. Type of Finding: Eligibility, Moving to Work Demonstration Program AL No.14.881, Other matter required to be reported in accordance with 2 CFR 200.516(a). Out of an approximate population of approximately 3,900 tenants, 86 tenant files were tested and the following deficiencies were noted:

- One file did not complete the income calculation correctly
- One file did not have a 214 declaration form for all members of the household
- One file did not have the required form of identification documented
- Two files did not have the unit inspection for the prior 3 years
- Two files did not have the required support to prove dependency

The Agency is not in compliance with HUD requirements regarding eligibility which could result in the incorrect amount of rental assistance provided. The Agency should reevaluate their established procedures and controls in place to ensure full compliance in regards to eligibility. The Agency needs to correct the deficiencies noted in the tested files and consider the impact to the rest of the population to tenant files that were not selected as part of the auditor’s sample.

Action	Time Frame	Responsible Person
7 files flagged for audit corrected	August 31, 2024	Program Manager, Christi Champ
Overdue Inspections completed	September 30, 2024	Program Manager, Nat Dybens
Quality Control review of files resumes. Paused since software conversion	July 31, 2024	Program Manager, Christi Champ
Disposal of documentation approved by supervisory staff	August 1, 2024	Program Manager, Nat Dybens
Checklists for eligibility functions enhanced with focus on the addition of family members to established families	July 31, 2024	Division Director, Beth Ochs
Additional 50 files randomly selected for audit compliance	July 31, 2024	Program Manager, Christi Champ



100 West 13th Avenue, Eugene, OR 97401 • PH 541-682-3755 • FAX 541-682-3411



Homes. People. Partnerships. Good. www.homesforgood.org

review		
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Sincerely,

Larissa Ennis
Governing Board Vice-Chair, Homes for Good Housing Agency

Jacob Fox, Executive Director
Executive Director and Governance Board Secretary, Homes for Good Housing

IN THE BOARD OF COMMISSIONERS OF THE
HOMES FOR GOOD HOUSING AGENCY, OF LANE COUNTY OREGON

ORDER 24-24-07-01H

In the Matter of Approving the FY23 Financial
Audit Significant Deficiency Plan of Action and
Moving to Work Eligibility Finding Plan of
Action

WHEREAS, The FY23 Audit was completed on June 28, 2024 by Berman Hopkins CPAs and Associates, LLP (B&H).

WHEREAS, A Significant Deficiency in Internal Control was found related to material changes that our auditors had to make in our FY23 audited financial statements.

WHEREAS, A Finding in the Moving to Work Eligibility Process was found. 86 files were randomly selected from a pool of approximately 3900. 7 files were noted to have deficiencies.

WHEREAS, Homes for Good is required to submit an approved (by the governance body) Plan of Action that addresses the deficiencies to the Oregon Secretary of State Audits Division (OSoSAD) within 30 days of the filing of the audit report.

WHEREFORE, Homes for Good created the FY23 Financial Audit Significant Deficiency Plan of Action and Moving to Work Eligibility Finding Plan of Action to be submitted to the Oregon Secretary of State Audits Division (OSoSAD).

NOW IT IS THEREFORE ORDERED THAT:

The Homes for Good Board of Commissioners approve the FY23 Financial Audit Significant Deficiency Plan of Action and Moving to Work Eligibility Finding Plan of Action to be submitted to the Oregon Secretary of State Audits Division (OSoSAD).

DATED this _____ day of _____, 2024

Chair, Homes for Good Board of Commissioners

Secretary, Homes for Good Board of Commissioners



BOARD OF COMMISSIONERS AGENDA ITEM

BOARD MEETING DATE: 07/24/2024

AGENDA TITLE: Homes for Good Fiscal Year 2025 Budget Timeline Overview

DEPARTMENT: Finance

CONTACT : Ela Kubok

EXT: 2506

PRESENTER: Ela Kubok

EXT: 2506

ESTIMATED TIME : 10 minutes

- ORDER/RESOLUTION
- PUBLIC HEARING/ORDINANCE
- DISCUSSION OR PRESENTATION (NO ACTION)
- APPOINTMENTS
- REPORT
- PUBLIC COMMENT ANTICIPATED

Approval Signature

EXECUTIVE DIRECTOR:

A handwritten signature in black ink, appearing to be "JAF", is written over a horizontal line.

DATE: 07.18.2024

LEGAL STAFF :

DATE:

MANAGEMENT STAFF:

DATE:



Homes for Good Budget Timeline Overview

BUDGET TIMELINE – REMAINING EVENTS	
DATE	EVENT
July 29 th	Jacob reviews budgets
August 2 nd	Materials distributed for Board finance committee meeting
August 7 th	Board Finance Committee meeting
August 8 th - August 20 th [dates/times TBD]	Budget Office Hours
August 26 th	Finalized budgets submitted to Communications for Budget Document preparation
September 13 th	Budget Materials distributed for September Board meeting
September 25 th	Budget presented to the Board for approval



BOARD OF COMMISSIONERS AGENDA ITEM

BOARD MEETING DATE: 07/24/2024

AGENDA TITLE: In the Matter of Approving the 2024-2028 Capital Fund Program Five-Year Action Plan.

DEPARTMENT: Executive

CONTACT : Kurt von der Ehe

EXT: 2568

PRESENTER: Jared Young

EXT: 2879

ESTIMATED TIME : 15

- ORDER/RESOLUTION**
- PUBLIC HEARING/ORDINANCE**
- DISCUSSION OR PRESENTATION (NO ACTION)**
- APPOINTMENTS**
- REPORT**
- PUBLIC COMMENT ANTICIPATED**

Approval Signature

EXECUTIVE DIRECTOR:

A handwritten signature in black ink, appearing to be "Kurt von der Ehe", written over a horizontal line.

DATE: 07.18.2024

LEGAL STAFF :

DATE:

MANAGEMENT STAFF:

DATE:



HOMES FOR GOOD MEMORANDUM REFERENCE DOCUMENT

TO: Homes for Good Board of Commissioners
FROM: Jared Young, Contract Administrator
TITLE: In the Matter of Approving the 2024-2028 Capital Fund Program Five-Year Action Plan
DATE: July 24, 2024

MOTION:

It is moved that the order/resolution be adopted approving the submission of the 2024-2028 Capital Fund Program Five-Year Action Plan.

DISCUSSION:

A. Issue

Capital Fund Five-Year Action Plan (the Plan) requires Board approval and certification that Homes for Good Housing Agency (Homes for Good) has complied with the applicable requirements listed on the certification form.

B. Background

Every year Homes for Good receives Capital Fund money to use on Public Housing units to provide routine maintenance and minor modifications. The Agency is required by Section 511 of the Quality Housing and Work Responsibility Act of 1998 (and ensuing HUD requirements) to submit a Five-Year Action Plan to the Department of Housing and Urban Development (HUD). This Five-Year Action Plan shows HUD how Homes for Good intends to spend the Capital Fund money over the next five years. HUD approval of the Plan is required for approval prior to initiating projects included in the plan. Along with the electronic submission, Homes for Good is required to submit to HUD the Board certification in a HUD prescribed format.

Homes for Good's Capital Projects team (CAP Team) uses several steps in developing this Five-Year Action Plan. First, a very detailed Green Physical Needs Assessment (GPNA) is conducted every five years. The assessment is conducted by a third party and looks closely at the condition of all of the Public Housing apartment communities. This includes siding, roofs, units, windows, condition of walkways and parking lots, etc. The CAP team then does their own Capital Needs Assessments (CNA) and site visits to take a closer look at the sites. They then use this information to prioritize and schedule work. Immediate health and safety concerns, accessibility needs and building envelope work are prioritized with this information.



The team also works closely with the Supportive Housing Division Property Management team to understand issues at the different properties and the capital work that may be required. Once the Five-Year Plan is developed the teams meet to discuss the plan further and understand the timing of projects related to specific apartment communities.

In addition to this outreach, the CAP team publishes in The Register-Guard and on the Homes for Good website a public notice of a 45-day comment period. Throughout the comment period, the Plan and supporting documents have been available for public viewing at both the Homes for Good service center and on the Homes for Good website. Once the public comment period closes, a public hearing on the proposed plan is held. This gives the community an opportunity to provide input on the plan. A public hearing was held at the end of the public comment period on June 27, 2024. No questions or comments were received regarding the Five-Year Capital Fund Action Plan 2024-2028.

A key strategy in the Homes for Good Equity Strategy plan is to include residents in planning for preservation work. In addition, HUD requires that housing authorities work with their Resident Advisory Boards (RAB) on the development of the plan. This year, input was received from RAB prior to creating the plan. After the plan was created, Homes for Good staff met with the RAB on July 11, 2024, and presented the plan's various components.

C. Analysis

As noted above, Homes for Good is required to submit the Capital Fund Program Five-Year Action Plan. The plan is developed with input from a variety of sources and stakeholders and prioritizes maintenance and upgrades that provide safe very livable housing.

As required, the Plan is also consistent and directly implements the 2020 Eugene-Springfield Consolidated Plan (Consolidated Plan). This plan is the result of an inter-jurisdictional effort designed to address the housing needs of the community. A priority need of the Consolidated Plan is to conserve and improve existing affordable housing. The Five-Year Plan does exactly that by allowing Homes for Good to upgrade and preserve the Public Housing portfolio.

As shown in much greater detail in Attachment 1 (Capital Fund Five-Year Plan 2024-2028) there is a wide range of work scheduled to occur over the next five years spread out across the Public Housing portfolio.

Over the next two years, the larger projects include security measures at eight sites, five community room remodels, kitchen upgrades at Pengra Court, new windows and exterior paint at Parkview Terrace, exterior painting at Laurelwood Homes, and purchasing plumbing equipment that will allow Homes for Good staff to clear drains, thus saving the Agency thousands of dollars in drain cleaning services.

If emergencies arise or priorities shift, the CAP team can shift money within years to meet those emergencies or priorities and revise this Plan annually to meet community needs.



D. Furtherance of the Strategic Equity Plan

This board order furthers the Homes for Good Strategic Equity Plan (SEP) following Pillars. Pillar #1 Listen to Our Community – A goal under this pillar is to make programmatic improvements based on direct feedback from the people we serve. Homes for Good staff has increased engagement with residents of our communities and the Resident Advisory Board (RAB) in the development of the Five-Year Capital Plan and will further improve communication with partners and continue getting feedback from the RAB.

Another goal under this pillar is to identify trends of housing discrimination. Strategies include conducting an accessible unit inventory and developing capital project plans to address accessibility shortcomings. The accessibility inventory has been completed but not yet analyzed. The current plan includes varied ADA modifications and can include others in future years once the inventory has been fully analyzed and prioritized.

Pillar #3 Create pathways to self-sufficiency – A goal under this pillar includes rehabilitation of existing affordable housing within the metro and rural areas. The strategy to improve this is to increase the cross-department involvement in neighborhood and resident meetings, as well as outreach tactics and incentives to increase community participation. The CAP team is implementing this by working closely with the Supportive Housing and Communications departments to increase resident community participation.

E. Alternatives & Other Options

There are no direct alternatives to approving the Capital Project Five-Year plan. If there are changes the board wishes to make to the plan it is recommended that these be addressed prior to the revision of the plan so that required deadlines are not missed. To receive a Capital Fund Program grant, a PHA must meet three administrative prerequisites which are: 1. Validate project-level information in HUD's data systems, 2. Have an approved Five-Year Action Plan and 3. Enter into a Capital Fund Annual Contributions Contract Amendment with HUD. Presenting the plan for board approval facilitates one of the three mandatory administrative requirements to obtain funding.

F. Timing & Implementation

Once the board order has been passed, the signed board order and other programmatic documents are submitted to HUD for final approval. HUD will process and calculate the grant award. This typically occurs within a month of the board approval and grant submittal.

G. Recommendation

It is recommended that the Board of Commissioners approve the submission of the 2024-2028 Capital Fund Program Five-Year Action Plan.

H. Follow Up

Upon approval by the Board, the Executive Director will submit the ORDER/Resolution of the Capital Fund 5-Year Plan to HUD.



100 West 13th Avenue, Eugene, OR 97401 • PH 541-682-3755 • FAX 541-682-3411



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I. Attachments

- Attachment I: Capital Fund Program Five Year Action Plan 2024-2028.

HOMES FOR GOOD HOUSING AGENCY
 CAPITAL FUND 5-YEAR ACTION PLAN
 FY24-FY28



WORK TO BE DONE	FY24	FY25	FY26	FY27	FY28
AMP 100 LAURELWOOD (29 UNITS)					
Interior/Exterior Comp Mod		\$80,000.00	\$80,266.00	\$140,000.00	
Appliances and Heaters			\$25,000.00		
Plumbing & Drain Lines					\$10,000.00
Gutters					\$60,000.00
Community Room and Shop Reroof					\$50,000.00
Generator				\$40,000.00	
Trees					\$20,000.00
Parking lot			\$15,000.00		
Walks, Slabs, & Driveways (Includes ADA Site work)		\$52,165.00	\$60,307.00		
Security Measures	\$25,000.00				\$40,000.00
Exterior Paint	\$100,000.00				
AMP 100 LAURELWOOD SUB TOTAL	\$125,000.00	\$132,165.00	\$180,573.00	\$180,000.00	\$180,000.00

WORK TO BE DONE	FY24	FY25	FY26	FY27	FY28
AMP 200 McKENZIE VILLAGE (172 UNITS)					
Roofs/Gutters		\$40,000.00		\$40,000.00	\$90,000.00
Kitchen Upgrades			\$40,000.00		
Plumbing and Storm Drain			\$20,000.00		
Abatements/Remediation			\$20,000.00		
Community Room Remodel		\$30,000.00			
Concrete (includes ADA site work)	\$20,000.00				
Bath Fans			\$30,000.00		
Security Measures	\$25,000.00				
Fencing					\$50,000.00
ADA Units				\$92,165.00	
Tub Surrounds	\$20,000.00				\$70,000.00
Appliances- Stoves/Fridges/Range Hoods			\$30,000.00		
Fairview Parking Lot			\$10,000.00		
Windows (as needed)			\$10,000.00		
Doors		\$40,000.00			
Trees					\$20,000.00
AMP 200 McKENZIE VILLAGE SUB TOTAL	\$65,000.00	\$110,000.00	\$160,000.00	\$132,165.00	\$230,000.00

HOMES FOR GOOD HOUSING AGENCY
 CAPITAL FUND 5-YEAR ACTION PLAN
 FY24-FY28



WORK TO BE DONE	FY24	FY25	FY26	FY27	FY28
AMP 200 PENGRA COURT (22 UNITS)					
Trees			\$20,000.00		
Fence			\$30,000.00		
Water Heaters (50 gal low boys)	\$29,000.00				
Kitchen Upgrades- Including appliances	\$200,000.00	\$200,000.00			
Interior Mods			\$50,000.00		
Irrigation and Plumbing			\$50,446.00		
Security Measures	\$25,000.00				
Parking Lot				\$25,000.00	
Concrete		\$40,000.00			
AMP 200 PENGRA COURT SUB TOTAL	\$254,000.00	\$240,000.00	\$150,446.00	\$25,000.00	\$0.00

WORK TO BE DONE	FY24	FY25	FY26	FY27	FY28
AMP 300 MAPLEWOOD MEADOWS (38 UNITS)					
Community Room Reroof & Gutters	\$20,000.00				
Trees					\$20,000.00
Fence				\$50,000.00	
Tub Faucets				\$25,000.00	
ADA Site Work					\$20,000.00
Security Measures	\$30,000.00				
Concrete Walks & Slabs			\$20,000.00		
Parking Lot				\$10,000.00	
AMP 300 MAPLEWOOD MEADOWS SUB TOTAL	\$50,000.00	\$0.00	\$20,000.00	\$85,000.00	\$40,000.00

HOMES FOR GOOD HOUSING AGENCY
 CAPITAL FUND 5-YEAR ACTION PLAN
 FY24-FY28



WORK TO BE DONE	FY24	FY25	FY26	FY27	FY28
AMP 400 PARKVIEW TERRACE (150 UNITS)					
Abatements/Remediation		\$10,000.00			
Window Replacement w/Exterior Paint	\$330,000.00	\$178,519.00			
Screen Doors			\$75,000.00		
Water Heaters/Boilers/Heating System					\$80,000.00
Elevator Upgrades/Repair			\$40,000.00		\$20,000.00
Security Measures	\$50,165.00				
Plumbing and Storm Drains					\$30,000.00
Generator			\$60,000.00		
Parking Lot					\$25,000.00
Remodel Community Room, Lobby, Lobby Restrooms			\$30,000.00		
Trees					\$10,000.00
Concrete Walks and Slabs		\$40,000.00			
AMP 400 PARKVIEW TERRACE SUB TOTAL	\$380,165.00	\$228,519.00	\$205,000.00	\$0.00	\$165,000.00

WORK TO BE DONE	FY24	FY25	FY26	FY27	FY28
AMP 500 LINDEBORG PLACE (40 UNITS)					
Plumbing and Storm Drains					\$10,000.00
Parking Lot			\$15,000.00		
Roof/Gutters		\$50,000.00			
Ductless Heat Pumps				\$180,000.00	
Security Measures	\$40,000.00				\$30,000.00
Trees				\$10,000.00	
Concrete Walks & Slabs			\$70,000.00		
Elevator Upgrades				\$30,000.00	
Generator			\$45,000.00		
Bath Upgrades		\$200,000.00	\$200,000.00		
AMP 500 LINDEBORG PLACE SUB TOTAL	\$40,000.00	\$250,000.00	\$330,000.00	\$220,000.00	\$40,000.00

HOMES FOR GOOD HOUSING AGENCY
 CAPITAL FUND 5-YEAR ACTION PLAN
 FY24-FY28



WORK TO BE DONE	FY24	FY25	FY26	FY27	FY28
AMP 500 VENETA VILLA (30 UNITS)					
Plumbing and Storm Drain					\$20,000.00
Roofs/Gutters					\$20,000.00
Concrete Walks and Slabs				\$70,000.00	\$91,000.00
Exterior Doors				\$38,000.00	
Trees					\$20,000.00
ADA Site Work/Pave Gravel Area/Dumpster Pad/Parking Lot	\$60,000.00				
AMP 500 VENETA VILLA SUB TOTAL	\$60,000.00	\$0.00	\$0.00	\$108,000.00	\$151,000.00

WORK TO BE DONE	FY24	FY25	FY26	FY27	FY28
AMP 500 VENETA SCATTERED SITES (20 UNITS)					
Comp Mods		\$50,000.00			
Concrete Walks and Slabs				\$69,000.00	
Roofs/Gutters					\$10,000.00
Plumbing/Sewer Drain		\$14,000.00			
Trees					\$20,000.00
Driveways/Parking Lots					\$80,000.00
Ext Paint				\$120,000.00	
AMP 500 VENETA VILLA SCATTERED SITES SUB TOTAL	\$0.00	\$64,000.00	\$0.00	\$189,000.00	\$110,000.00

HOMES FOR GOOD HOUSING AGENCY
 CAPITAL FUND 5-YEAR ACTION PLAN
 FY24-FY28



WORK TO BE DONE	FY24	FY25	FY26	FY27	FY28
AMP 600 CRESVIEW VILLA (34 UNITS)					
Concrete Walks and Slab					\$40,000.00
Parking Lot					\$20,000.00
Ductless Heat Pumps				\$179,019.00	
Security Measures	\$22,000.00				\$22,165.00
Roofs					\$60,000.00
Trees					\$10,000.00
Rear ADA Exit			\$20,000.00		
Generator			\$40,000.00		
Plumbing and Storm Drains					\$10,000.00
AMP 600 CRESVIEW VILLA SUB TOTAL	\$22,000.00	\$0.00	\$60,000.00	\$179,019.00	\$162,165.00

WORK TO BE DONE	FY24	FY25	FY26	FY27	FY28
AMP 600 RIVERVIEW TERRACE (60 UNITS)					
Seismic Upgrade				\$40,000.00	
Concrete Walks and Slab					\$30,000.00
Exterior Bollard Lights			\$20,000.00		
Trees					\$10,000.00
Security Measures	\$30,000.00				
Generator	\$57,000.00				
Elevator Repair/Upgrade			\$32,165.00		\$40,019.00
Flooring in common areas	\$40,019.00				
Abatements/Remediation	\$35,000.00				
AMP 600 RIVERVIEW TERRACE SUB TOTAL	\$162,019.00	\$0.00	\$52,165.00	\$40,000.00	\$80,019.00

Work Item Sub Totals \$1,158,184.00 \$1,024,684.00 \$1,158,184.00 \$1,158,184.00 \$1,158,184.00

HOMES FOR GOOD HOUSING AGENCY
 CAPITAL FUND 5-YEAR ACTION PLAN
 FY24-FY28



<u>OTHER</u>	FY24	FY25	FY26	FY27	FY28
1406- Operations	\$250,000.00	\$300,000.00	\$250,000.00	\$250,000.00	\$250,000.00
1408- Management Improvements	\$35,000.00	\$35,000.00	\$35,000.00	\$35,000.00	\$35,000.00
1410- Grant Administration Fee (10%)	\$168,000.00	\$168,000.00	\$168,000.00	\$168,000.00	\$168,000.00
1480- Grant Audit	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00	\$2,000.00
1480- Architect	\$20,000.00	\$20,000.00	\$20,000.00	\$20,000.00	\$20,000.00
1480 Fees and Sundries	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00	\$10,000.00
1480 GPNA	\$1,500.00	\$35,000.00	\$1,500.00	\$1,500.00	\$1,500.00
1480- Cap Fund Vehicle Purchase	\$0.00	\$50,000.00	\$0.00	\$0.00	\$0.00
1480- Relocation	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$5,000.00
1480- Contingency (3%)	\$45,000.00	\$45,000.00	\$45,000.00	\$45,000.00	\$45,000.00
"Other" Sub Totals	\$536,500.00	\$670,000.00	\$536,500.00	\$536,500.00	\$536,500.00

	FY24	FY25	FY26	FY27	FY28
Work Items Sub total	\$1,158,184.00	\$1,024,684.00	\$1,158,184.00	\$1,158,184.00	\$1,158,184.00
Others Sub Total	\$536,500.00	\$670,000.00	\$536,500.00	\$536,500.00	\$536,500.00
Total	\$1,694,684.00	\$1,694,684.00	\$1,694,684.00	\$1,694,684.00	\$1,694,684.00

Left to spend \$0.00 \$0.00 \$0.00 \$0.00 \$0.00

IN THE BOARD OF COMMISSIONERS OF THE
HOMES FOR GOOD HOUSING AGENCY, OF LANE COUNTY OREGON

ORDER 24-24-07-02H

In the Matter of Approving the Submission of
the Five-Year Capital Fund Action Plan 2023-
2027.

WHEREAS, it is necessary for the Board to approve the submission of the Five-Year Capital Fund Action Plan 2024-2028 for Homes for Good Housing Agency; and

WHEREAS, the Five-Year Capital Fund Action Plan 2024-2028 was presented to the Resident Advisory Board (RAB) on July 11, 2024; and

WHEREAS, a public hearing to receive comments on the Five-Year Capital Fund Action Plan 2024-2028 was held on June 27, 2024; and

WHEREAS, Homes for Good Housing Agency Executive Director has recommended approval of the proposed Five-Year Capital Fund Action Plan 2024-2028; and

WHEREAS, Pillars 1 and 3 of the Homes for Good Strategic Equity Plan (SEP) were followed; and

WHEREAS, the Board having fully considered the Executive Director's recommendation,

NOW IT IS THEREFORE ORDERED THAT: The Board authorizes the submission of the Five-Year Capital Fund Action Plan 2024-2028.

DATED this _____ day of _____, 2024

Chair, Homes for Good Board of Commissioners

Secretary, Homes for Good Board of Commissioners



BOARD OF COMMISSIONERS AGENDA ITEM

BOARD MEETING DATE: 07/24/2024

AGENDA TITLE: Homes for Good Hate & Bias Policy

DEPARTMENT: Human Resources

CONTACT : Bailey McEuen

EXT: 2520

PRESENTER: Bailey McEuen

EXT: 2520

ESTIMATED TIME : 15 minutes

- ORDER/RESOLUTION
- PUBLIC HEARING/ORDINANCE
- DISCUSSION OR PRESENTATION (NO ACTION)
- APPOINTMENTS
- REPORT
- PUBLIC COMMENT ANTICIPATED

Approval Signature

EXECUTIVE DIRECTOR:

A handwritten signature in black ink, appearing to be "B. McEuen", is written over a horizontal line.

DATE: 07.18.2024

LEGAL STAFF :

DATE:

MANAGEMENT STAFF:

DATE:



Hate & Bias Reporting and Response Quick Reference Guide

Follow the links below for quick access to Homes for Good's hate & bias incident response resources, including the full toolkit, complaint form, reporting form, templates and participant resources.



The Toolkit

The full Hate & Bias toolkit contains information about hate & bias incidents, the 5 Ds of bystander intervention, and Homes for Good's procedures for responding to and addressing hate & bias incidents in our communities and our workplace.



The Hate & Bias Incident Complaint Form

The Hate & Bias Incident Complaint Form is a PDF form that should be used to gather information from victims and witnesses of hate & bias incidents. Follow the link to the right to download the form.



The Hate & Bias Report Form

The Hate & Bias Report form is an internal digital form used to notify leadership of hate & bias incidents to ensure accountability and to capture data for reporting purposes. It should be completed by the person who witnessed the hate & bias incident, or who took the complaint.



Templates

Follow the link to the right for quick access to various templates associated with the hate & bias response procedures.



Participant Resources

Follow the link to the right for quick access to the Hate & Bias Resource Handout. The handout should be provided to participants upon receipt of a complaint of a hate & bias incident.



Hate & Bias Toolkit

Workbook

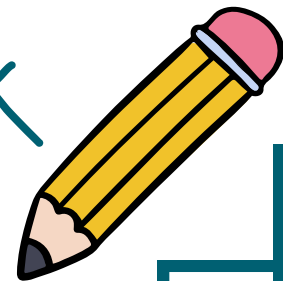


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INTRODUCTION

Purpose

Homes for Good is a steward of valuable public resources and is dedicated to ensuring equity in housing, employment and contracting across race, culture, sex, sexual orientation, gender, religion, national origin, family status, ability and income level. We strive to create a diverse, equitable and inclusive environment where all groups have access to the resources and opportunities essential to fulfilling their potential for success and where difference in life outcomes are not predicated on the basis of race, gender or other elements of identity.

It is the policy and duty of Homes for Good Housing Agency to administer all aspects of its housing programs and employment practices without regard to race, sex, sexual orientation, gender identity, national origin, religion, family status, veteran status, ancestry, age, genetic information or disability. This toolkit is designed to protect applicants, residents, visitors and team members from threats, harassment, violence or abuse while on Homes for Good's property and/or during the course of work.

Homes for Good is committed to maintaining a no-tolerance policy for hate and bias incidents, meaning we take strong action against any discriminatory behavior or speech. We act quickly to ensure a safe and inclusive environment for everyone involved, emphasizing our commitment to promoting diversity and rejecting any form of prejudice within our community.



Scope

The procedures within this toolkit address Homes for Good's response to reported hate & bias incidents toward staff, clients and visitors. However, it serves as a toolkit primarily designed for staff and property management personnel.



CHAPTER 1

Definitions - Hate, Bias & Discrimination

Hate, in the context of hate incidents, is an intense and irrational emotion derived from fear, rage and prejudicial attitudes which often leads to acts of aggression and hostility.

Hate toward a particular group may be rooted in the perception of that group as a threat. Prejudicial attitudes often lead to perceiving individuals or groups, that one considers different from them self, as threatening their way of life – whether it be their access to resources or their customs, norms, values and beliefs.

Bias is prejudicial beliefs, attitudes and stereotypes held toward particular groups of people based on actual or perceived shared characteristics or identity (e.g. race, sex, religion, etc.).



Conscious or unconscious bias held by individuals impact how they make decisions – e.g. individual interactions, accusations, hiring/promotional decisions, where to donate money, who to believe, who not to believe – based on those biases.



Discrimination is defined as the systemic denial (intended or unintended) of recognition, access to resources, power, privilege, and opportunity to certain people based on actual or perceived association with a group. Individual acts of discrimination are cumulative, contributing to systemic patterns.

Bias vs. Discrimination

You may notice in the bias graphic that beliefs, attitudes and stereotypes are expressed with thought bubbles, where as in the discrimination graphic, they are expressed as speech bubbles. This distinction establishes bias as internally held prejudice, whereas discrimination refers to actions taken based on internally held prejudice beliefs.

What are Hate & Bias Incidents

The term “hate incident” refers to both non-criminal and criminal hate and bias activity. Hate & bias incidents are distinguished between criminal and non-criminal incidents because the distinction determines how the incident is reported and the Agency’s subsequent approach to response. Below you will find more on non-criminal versus criminal hate & bias incidents.

Non-Criminal Hate & Bias Incidents

This type of hate & bias incident includes bias or bigoted acts that target a group of people, individuals, or property that are not classified as crimes. Non-criminal hate activity is often protected by free speech and can include rallies, offensive signs or t-shirts, leafleting & flyer distribution, and group meetings. Attempts to regulate speech face substantial constitutional hurdles. Law enforcement typically does not respond to non-criminal hate & bias activity, often expressed as “free speech.”

Hate Speech is speech that offends, threatens or insults groups based on the real or perceived association with a protected class. Hate speech is motivated by bias and has harmful effects on communities, often inciting hostility, vulnerability and fear.



The First Amendment establishes and protects each of our rights to freedom of speech and expression. It has supported and served important efforts for communities to gain rights through the Civil Rights Movement, women’s right to vote and LGBTQ+ Rights Movement.

However, Homes for Good’s workplace & community policies prohibit hate & bias related behavior in our housing, our workplace and during the course of work for our team members.

Some real examples of non- criminal hate and bias incidents in the Eugene community are listed below:

- Recruitment flyers on a community bulletin board for white nationalist organizations that reference a pure race and securing a future for white children.
- A customer would not accept help from a person of color at an office. The customer indicated that they would wait until a white person came to help them.
- A female wearing a hijab was walking down the street with family members. They reported that occupants in a vehicle circled the block three times yelling anti-Muslim hate speech at them and holding up their middle fingers.

Criminal Hate & Bias Incidents

A hate crime, or bias crime, is any criminal act against a person, group of people, or property that is motivated by bias or prejudice against the real or perceived association of a person or group with a protected class.

Crimes range from verbal harassment, graffiti, property damage, to physical assault or murder. Criminal mischief, intimidation and assault are common hate and bias crimes.

Some real examples of hate and bias crimes in the Eugene community are listed below:

- A woman was hit and kicked by three unknown men after a comment was made regarding her gender and appearance (the crime charged was assault and the hate indicators are the comments regarding gender identity).
- A student's parent reported graffiti containing racial and anti-Semitic slurs on the side of the school's playground (the crime charged was vandalism and the hate indicators are the racial and anti-Semitic slurs).
- A woman boards a bus and is looking out a window. The person sitting in front of the window that the woman is looking out starts yelling homophobic slurs at her and calls her 'gay' (this is not a crime). Without provocation, the person yelling homophobic slurs gets up and begins striking the woman and people around her (the crime charged was assault and the hate indicators are the homophobic slurs).

The Use of "hate" vs "bias"

You might be wondering why we use the terms hate and bias. You will often see hate and bias used interchangeably. Federal legislation mostly uses the term "hate crime" while Oregon state statutes use "bias crime." They both refer to the same thing. The words "hate" and "bias" are put in front of the words "crime" or "incident" because they refer to the motivation of the event. For the sake of consistency, we will mostly use the term "hate crime" when referring to criminal hate and bias incidents because it's a more commonly used term.

Protected Classes

Protected classes are groups of people that share characteristics legally protected by the law. These protections can be found in Federal, State and Local laws. All hate and bias related crimes and incidents are reported on the real or perceived affiliation with a protected class. Federally protected classes include:

- Race
- Color
- Ethnicity
- National Origin
- Sex
- Religion
- Disability

Other jurisdictions may also add their own protected classes to the list. The State of Oregon also includes:

- Sexual Orientation
- Marital Status
- Gender Identity
- Membership in a Labor Organization
- Age
- Economic/Social Status

The City of Eugene has added the following to Federal and State designations:

- Familial Status
- Marital/Domestic Partner Status
- Source of Income

We will explore the definitions of each protected class below:

Race:

Racial discrimination involves treating someone unfavorably because they are of a certain race or because of personal characteristics associated with race.

Color:

Color discrimination involves treating someone unfavorably because of skin color.

National Origin:

National origin discrimination involves treating people unfavorably because they are from a particular country or part of the world, because of ethnicity or accent, or because they appear to be of a certain ethnic background (even if they are not). National origin discrimination also can involve treating people unfavorably because they are married to (or associated with) a person of a certain national origin.

Sex:

Sex discrimination involves treating someone unfavorably because of that person's sex. Discrimination against an individual because of gender identity, including identifying as transgender, or because of sexual orientation is discrimination because of sex in violation of Title VII.

Religion:

Religious discrimination involves treating a person unfavorably because of his or her religious beliefs. The law protects not only people who belong to traditional, organized religions, such as Buddhism, Christianity, Hinduism, Islam, and Judaism, but also others who have sincerely held religious, ethical or moral beliefs.

Disability:

Disability discrimination occurs when an employer or other entity covered by the Americans with Disabilities Act (ADA) or the Rehabilitation Act treats an individual with a disability unfavorably because she has a disability.

Sexual Orientation:

Discrimination based on sexual orientation involves treating someone unfavorably based on their emotional, romantic or sexual attraction to other people. Sexual orientations include (but are not limited to) gay, lesbian, straight, bisexual, and asexual.

Marital Status:

Marital status discrimination involves treating someone unfavorably based on their legal relationship status. Marital status may include married (either same sex or opposite sex), divorced, separated, or single.

Gender Identity:

Gender identity discrimination occurs when someone is treated unfairly because of their gender identity (one's innermost concept of self as male, female, a blend or both or neither), including their appearance, mannerisms or other gender-related characteristics.

Membership in a Labor Organization:

Discrimination based on membership to a labor organization involves being treated unfavorably because of one's membership or one's favor of labor organizations.

Age:

Discrimination based on age includes anyone at or over the age of 18, and involves someone being treated unfavorably based on their age.

Economic/Social Status:

Discrimination based on socioeconomic status involves someone being treated unfavorably based on a combination of factors such as their level of income, level of education attained and previous or currently held occupation.

Familial Status:

Discrimination based on familial status involves when someone (single parent, divorced, co-parent) is treated unfavorably because they have a child under age 18 in the household, whether living with a parent, a legal custodian, or their designee. It also covers a woman who is pregnant, large families, and people in the process of adopting or gaining custody of a child/children.

Marital/Domestic Partner Status:

Discrimination based on marital or domestic partner status involves someone being discriminated against based on being single, married, in a same-sex domestic partnership, opposite-sex domestic partnership, divorced or widowed.

Source of Income:

Discrimination based on source of income is when someone is treated unfavorably based on the means by which a person makes an income. Some examples of income types falling under this category are Social Security, Supplemental Security Income (SSI), veteran's benefits, WIC, housing assistance, food benefits, Medicaid, and place of employment.

CHAPTER 2

Bystander/Upstander Intervention

An upstander is someone who stands up, speaks out, and/or takes action in defense of those who are targeted for harm. They actively work to halt injustice and aim to transform situations where individuals or groups are mistreated.

Homes for Good's approach to interrupting hate & bias incidents is centered around safe intervention and support to individuals targeted by harassment.

This section delves into the importance of safe intervention and support for individuals facing harassment. The core of effective prevention and response to hate and bias lies in the concept of safe intervention. Upstanders play a crucial role in minimizing harmful situations. Similar to other concepts in this Toolkit, upstander intervention is nuanced and context-dependent.

It's crucial for upstanders to prioritize the needs of the target when taking action. The decision to intervene is a personal one, and individuals may opt for the safest course for themselves, which is entirely understandable. However, for those who choose to intervene, upstanders play a vital role in empowering the target, respecting their decisions, and supporting their actions.

Various strategies exist for safely intervening and providing support to a target, as well as for being an active bystander. Upstander intervention serves as a response to hate, bias, and discrimination, functioning as a pivotal tool in effective prevention and response to such issues.

Being prepared as an upstander requires practice, and participation in an educational training focused on safe upstander intervention can equip you with the skills and an action plan to address instances of hate. Meanwhile, we recommend reading this brief introduction to upstander intervention and exploring additional resources provided below.

5 D's of Bystander Intervention

The "5 D's" of bystander intervention were created in partnership by Hollaback (now Right-to-Be), and GreenDot, both of which are mission driven organizations who aim to reduce power-based personal violence and street harassment. We explore the 5 Ds below (brought to you by Right to Be righttobe.org/guides/bystander-intervention-training)

DISTRACT

Distraction is a subtle and creative way to intervene. Its aim is simply to derail the incident of harassment by interrupting it. They keys to good DISTRACTION are:

- Ignore the person who is harassing, and engage directly with the person who is being harassed.
- Don't talk about or refer to the harassment that's happening. Instead, talk about something completely unrelated.



Here are some examples you can try:

Pretend to be lost and ask the person being harassed to give you direction. Ask them for the time.

Pretend you know them & act excited to have "randomly" run into them (be sure to respect their personal space).

Talk about something random, as long as it takes attention away from the person who's harassing them.

If you feel safe, get in the way. Continue what you were doing, but get in between the person harassing and the person being harassed.

"Accidentally" spill or drop something or cause a commotion to shift the attention away from the harassment - you could drop your coffee, water, the change in your wallet, or your phone.



The power of distraction is that no one has to know you are actually intervening in harassment. If you're someone creative or shy, or if it seems like the person doing the harassment might escalate their behavior if you speak out openly against it, then Distraction can be a great, subtle option for you.

DELEGATE

Delegation is asking a third party for help when intervening in harassment. The keys to delegation are:

- Look for a delegate who is ready and willing to help. Often, a great choice is the person right next to you.
- When you delegate someone to help you, try to tell them as clearly as possible what you are witnessing and how you'd like to help them.



Say to your delegate, "I think the person with the red hat is making the one in the blue jacket uncomfortable." Can you help me get them out of the situation? Can you distract while standing in between while I ask if they're ok?

In public spaces, your delegate could be someone who has authority in the space; a store manager, bus driver, transit employee. Near a school, a teacher or administrator.

Speak to someone near you who also notices what's happening and might be in a better position to intervene. Work together to come up with a plan to intervene.

Sometimes people wonder: "Can I delegate the police to intervene in harassment?"

You should contact the police if you witness a hate & bias crime, unless the victim explicitly asks you not to. You should always contact the police if there is an imminent threat to the safety of staff and/or participants.

Remember, some people may not be comfortable or feel safe with the involvement of law enforcement. For many people and communities, a history of mistreatment and violent escalation by law enforcement has led to fear and mistrust of police involvement. There are many people – for instance communities of color and undocumented individuals – who may rightfully feel unsafe in the hands of the police.

If you are unsure about whether to contact the police, you should connect with your manager for guidance.

DOCUMENT

Documentation involves either recording or taking notes on an instance of harassment. It can be really helpful to record an incident of harassment, but there are some keys for safety and responsibly documenting harassment:

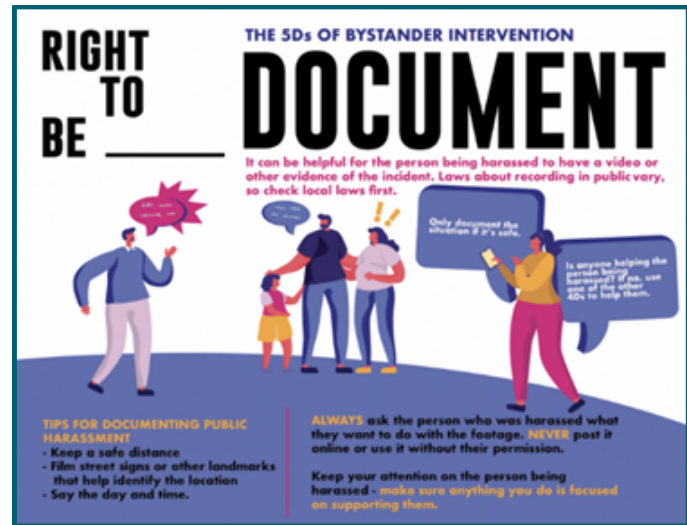
- Assess the situation. Is anyone helping the person being harassed? If not, use another of the 5 D's. Recording someone's experience of harm without ensuring they're already receiving help can create further trauma for them. If someone else is already helping out, assess your own safety, and if you're safe, begin documenting.
- Always ask the person who is being harassed what they want to do with your documentation (recording, notes etc.). Never post it online or use it without their permission.

There are several reasons to ask the victim of harassment what they want to do with documentation. First, the experience of harassment could very well be traumatic for the person who was harmed. Posting another person's traumatic experience anywhere without their consent is no way to be an effective or helpful bystander.

Being harassed or violated is already a disempowering experience, and if we publicize an image or footage of a person being harmed without their consent, it can make them feel even more powerless. If the documentation goes viral online, it can make that person visible in a way they may not want to be.

Also, if we publicize footage of someone being harassed in a way that is illegal, we can open a host of legal issues for that person without their consent. Our action may force them to engage with the legal system in a way that they're not comfortable with.

Check out [this video from WITNESS](#) for tips on how to document effectively.



DELAY

Even if we can't act in the moment, we can still make a difference for someone whos' been harassed by checking in on them after the fact. Many types of harassment happen in passing or very quickly, and it's not always possible we'll have a chance to intervene in another way. But we don't have to just ignore what happened and move on. We can help reduce that person's trauma by speaking to them after an instance of harassment.



Here are some examples of how you can delay:

- Ask them if they're ok and let them know you saw what happened and it wasn't ok.
- Ask them if there's any way you can support them.
- Offer to accompany them to their destination or sit with them for a while.
- Share resources with them and offer to help them make a report if they want to. If
- you've documented the incident, ask them if they want you to give them the documentation.

DIRECT



Sometimes, we may want to respond directly to harassment by naming the inappropriate behavior confronting the person doing the harm.

Use this one with caution, because direct intervention can be risky - the person being harassed may redirect their abuse toward the intervening bystander or may escalate the situation in another way.

The first key to direct intervention is to assess the situation before you decide to respond, by asking yourself the following questions:

Are you physically safe?

Is the person being harassed physically safe?

Does it seem unlikely that the situation will escalate?

Can you tell if the person being harassed wants someone to speak up?

If you can answer "yes" to all of these questions, you might choose a direct response.

The second key to Direct intervention is to keep it short and succinct. As tempting as it may be, avoid engaging in dialogue, debate or an argument – since this is how situations can escalate. If the person harassing responds to your Direct intervention, focus your attention on assisting the person who was harmed, instead of engaging with the person doing the harm.

If you choose to intervene directly, here are some examples of what you can say:

"That's inappropriate"

"That's homophobic"

"That's racist"

"That's not ok"

"That's harassment"

"Leave them alone"

"Please stop right now"

"They've asked you to leave them alone and I'm here to support them"

A note about safety: We don't ever want you to get hurt while trying to help someone out. Always prioritize safety and consider possibilities that are unlikely to put you or others in harm's way.

CHAPTER 3

Reporting Process

Reporting hate & bias incidents is the most basic and important way to respond. Homes for Good is committed to investigating reports of hate & bias and responding by taking prompt remedial action.

Internal Reporting

Incidents of hate & bias can be reported to Homes for Good in a number of ways.



Residents, participants & visitors can report incidents of hate & bias to Property Management staff, Resident Services staff, their Housing Specialist, Case Manager or Program Manager.

Homes for Good team members can report hate & bias incidents by following the procedures in the appendices of this toolkit, which outline the protocols for reporting hate & bias incidents they experience, witness and those that are reported to them during the course of work.

External Reporting

There may be times when it's appropriate to report a hate & bias incident to external parties, including law enforcement.

In situations where someone's safety is immediately at risk, it's imperative to act promptly. If a team member witnesses a hate & bias crime in progress where someone is in immediate danger, they should not hesitate to call 911 for emergency assistance.

Homes for Good team members and third-party property management staff should report hate & bias incidents to the local law enforcement agency non-emergency line when:

- Homes for Good property has been vandalized with hate graffiti or posters.

Team members are encouraged to report hate & bias crimes to law enforcement when:

- They witness a hate & bias crime (unless the victim objects). See Chapter 1 - Definitions about the distinction between hate & bias crimes and non-criminal hate & bias incidents.
- They are the victim of a hate & bias crime while on duty and/or on Homes for Good's property.

Homes for Good residents, participants and visitors should be encouraged to contact local law enforcement when reporting a hate & bias crime to a Homes for Good team member or third-party property management staff members.

Homes for Good is committed to prioritizing victim autonomy and safety when responding to hate & bias incidents in our communities and our workplace. Chapter 2 of this toolkit outlines why a victim of a hate & bias crime might not want to report the incident to law enforcement. In alignment with this commitment, the decision to report a hate & bias crime to non-emergency law enforcement should primarily lie with the victim. However, there may be instances where Homes for Good decides to report a hate & bias incident (criminal or non-criminal) to law enforcement.

In the event a staff member is unsure of whether an incident should be reported to law enforcement, they should escalate the issue to their manager who will make the decision about appropriate external reporting.

Regardless of the context, victims of non-criminal hate & bias incidents should be encouraged to report the incident occurring within the City of Eugene to the Office of Human Rights & Neighborhood Involvement at (541) 682-5177, and should be informed of their right to file a complaint with HUD, the Department of Justice (DOJ), the Fair Housing Council of Oregon or other appropriate authority.

Contact information for local law enforcement jurisdictions and reporting authorities listed above are included in the Hate & Bias Reporting Resources handout linked below.

[Hate & Bias Resources Handout](#)

CHAPTER 4

Agency Response

Homes for Good will respond to and investigate all reports of hate & bias incidents in our housing communities and our workplace.



Designated Contact Person

The designated contact person will be responsible for maintaining communication with the reporting party. The designated contact person will be identified in writing, along with their contact information, in the complaint acknowledgement communication.



Acknowledgement

upon receipt of any report of a hate & bias incident, the complaint will be acknowledged in writing. Depending on the context of the complaint, the following written communication will be provided to the reporting person:

If the reporting person is a resident, participant or visitor -

[Participant Complaint Response Letter Template](#)

If the reporting person is a Homes for Good employee -

[Employee Civil Rights Complaint Acknowledgement Letter](#)

Investigation

All reports of hate & bias incidents in Homes for Good's housing communities and/or workplace will be investigated promptly. The assigned investigator will depend on the context of the complaint. The investigator may be:

- Staff member who took the complaint
- The Manager of the program or property
- The Division Director of the program or property
- Human Resources staff

When assigning an investigator, the following will be considered:

- The reporting party (participant, resident, visitor, staff member)
- Potential biases of investigator (i.e. personal/familial relationships with the complaining or accused party)
- Previous education and training
- The severity of the alleged incident
- For hate and bias incidents against Homes for Good staff members, the Human Resources Director will be responsible for assigning an investigator

Timely Response

Addressing hate & bias incidents requires a prompt and thorough investigation to instill a sense of security and justice within affected communities. It's crucial to acknowledge the inherent complexity of each case as the nature of hate and bias incidents vary greatly. Due to these intricacies, setting rigid timelines becomes impractical.



To maintain transparency and communication, the assigned investigator will furnish complainants with regular updates, ensuring that pertinent information is shared no less frequently than every two weeks. This approach aims to keep those affected informed and engaged throughout the investigation.

CHAPTER 5

Resolution

The action taken by Homes for Good following a substantiated finding of a hate & bias incident within our housing communities and/or workplace will depend on several factors including but not limited to the nature and severity of the incident (including its status as criminal or non-criminal), the perpetrator's history of involvement in related incidents and whether or not they have previously been put on notice.

Other relevant variables that may influence the response strategy include the impact on the harmed individual or group, potential escalation risks and the broader community context.

Disciplinary Measures

In the event an investigation results in a substantiated finding confirming a Homes for Good participant, resident or resident visitor committed a hate & bias crime or was the perpetrator of a hate & bias incident, appropriate remedial action will be taken. The type of remedial action will depend on several factors and can include resident coaching, lease enforcement notices up to and including potential eviction.

In the event a Homes for Good team member is found to have violated Homes for Good's policy against discrimination & harassment, whether it be against another team member, a participant, resident or visitor, prompt disciplinary action will be taken in accordance with Agency policy and the Collective Bargaining Agreement when applicable.

Support for Victims

Supporting the victims of hate and bias incidents is crucial in creating a resilient and inclusive community and workplace. When individuals experience such incidents, it's essential that we provide them with the necessary support to navigate through the aftermath. In the most extreme cases, a civil rights transfer may be an appropriate solution in support of the victim of hate & bias.

In cases where residents, participants or applicants encounter challenges beyond our immediate scope, our procedures direct them to essential contacts, including enforcement agencies such as the U.S. Department of Housing and Urban Development (HUD), Fair Housing Council of Oregon (FHCO) and the Department of Justice (DOJ). Additionally, it highlights referrals to community and non-profit organizations equipped to offer specialized assistance and resources to victims.

By fostering a network of support and connecting affected individuals with the appropriate agencies, we can collectively work towards a community that prioritizes compassion, understanding, and resilience.

Homes for Good team members who experience hate and bias, or who witness hate and bias have access to the Employee Assistance Program, along with other Agency health and wellness benefits.

 **Employee Assistance Program (EAP) Flyer**


 **Benefits Guide**

Continual Education for Homes for Good Team Members


In alignment with our organizational values and Strategic Equity Plan, Homes for Good provides continual educational opportunities to our team members on various topics related to diversity, equity, inclusion and access including fair housing, reasonable accommodations, racial justice, LGBTQ+ inclusion, bystander intervention and preventing discrimination & harassment.

OREGON DOJ'S BIAS RESPONSE HOTLINE


Were you targeted with bias due to your race, color, national origin, sexual orientation, gender identity, disability, or religion?
Make a report, receive support, learn about your options.




Call the Hotline
1-844-924-BIAS (2427)
240+ Interpreters/Languages
We Accept All Relay Calls

 **Live Operator**

- Monday - Friday 9am - 5pm
- Receive support
- Options for next steps
- Options for community support


 **Leave a Voicemail**

- After Hours
- Request a call back
- Leave as much or as little detail as you'd like



Report Online
StandAgainstHate.Oregon.gov
8 Languages
Additional Languages Upon Request

-OR-



- Make a report anytime
- Request a call back
- Leave as much or as little detail as you'd like





FAIR HOUSING COUNCIL

OF OREGON

 fhco.org/report-housing-discrimination

 **(503) 223-8197 Extension 2**






Online

You can Report Housing Discrimination with FHEO online in English (also available in Español, 中文, Tiếng Việt, 한국어, বাংলা, Pусский, हिंदी, and Somali)


Report now >



Phone

We speak your language! Talk with an FHEO intake specialist by calling: 1-800-669-9777

You can also call your regional FHEO office at the phone numbers on this list.



Mail

You can print out this form (also available in Español, 中文, Tiếng Việt, 한국어, বাংলা, Pусский, हिंदी, and Somali) and mail it to your regional FHEO office at the address on this list.

CHAPTER 6

Recordkeeping & Periodic Review

Homes for Good's leadership team shall act as a central repository of all documents pertaining to actual or alleged hate & bias incidents. Each report shall be maintained within an individual file containing records:

1. Detailing the investigation into allegations, including statements from all witnesses and employees interviewed, and;
2. Describing all actions taken by Homes for Good

An [Investigation Report Form](#) will be used to document the investigation process, outcome and actions taken.

One file will be maintained for each person filing a Hate & Bias Incident Report. Each report will also be reflected in the tracking log maintained by the Leadership team.

The same file will be used for any subsequent hate & bias incidents reported. All documents associated with the incident(s) must be kept in this file. Copies of all no-trespass notices, restraining orders and injunctions relevant to the investigation will be kept in this file. Records will be preserved for a period of no less than five years following the date of the incident.

Note: in the event a hate and bias report alleges discriminatory behavior by a member of the leadership team, all identifying information will be redacted from the centralized tracking log and records will be maintained by Human Resources.

Ensuring the effectiveness of our hate & bias response is an ongoing commitment of Homes for Good. To uphold its relevance and effectiveness, periodic review and evaluation are imperative components to our approach.

Procedures outlined in this toolkit will be evaluated no less than annually. The review process will include seeking feedback and input from staff and other affected parties.

When deemed necessary, protocols will be adjusted based on feedback and lessons learned from previous incidents and approved by the leadership team.



Conclusion

In addressing instances of hate and bias, it's essential to reaffirm our commitment to its eradication from our housing communities and workplace. Our focus is on ensuring safety and inclusivity for all, regardless of background or identity. By doing so, we strengthen our collective resilience against discrimination and work towards fostering a culture that firmly opposes hate and bias in all forms.



HATE & BIAS INCIDENT RESPONSE FLOWCHART



APPENDIX 1

Staff Procedures - Introduction

The procedures outlined in this section are designed to provide general guidance applicable to a variety of contexts throughout our organization. While the procedures offer valuable frameworks for addressing instances of hate & bias, it's essential to note that individual departments may have specific procedures related to transactions, documentation and software usage (ie. Yardi, FileVision, Letter Assist). Please be sure to follow any department procedures in conjunction with the guidelines provided in the following procedures to ensure a thorough and effective response.

Homes for Good and/or third-party property management staff may learn of hate and bias incidents against a resident, participant, visitor or staff member in one of two ways.

- Witnessing or experiencing a hate & bias incident firsthand
- Taking a report of a hate & bias incident

The following procedures utilize two separate forms to document and report hate & bias incidents in our communities and workplace.

The **Hate & Bias Incident Complaint Form** is a PDF form designed to capture and document the information necessary to investigate resident and team member complaints of hate & bias incidents. It can be printed, and should be completed by the victim and witnesses to the incident whenever possible. It can also be completed by a staff member on behalf of the victim and/or witnesses when appropriate.

The **Hate & Bias Incident Reporting Form** is a digital form designed to notify the leadership team of a hate & bias incident to ensure follow up and resolution, and to track data related to hate & bias incidents. It should be completed by the staff member who witnessed the hate & bias incident, or the staff member who took the initial report from the victim and/or witness(es).

Hate & Bias Incident Complaint Form



Captures and documents information necessary to investigate a complaint of hate & bias. Can be printed and completed by hand, or completed digitally in PDF format.

Hate & Bias Incident Reporting Form



Digital form. Notifies leadership and captures data for reporting and tracking purposes.

APPENDIX 2

Staff Procedure - When a team member witnesses a hate & bias incident against a resident, participant or visitor in a Homes for Good community or workplace

- 1.** Determine if the incident is emergent. Is anyone in immediate danger? if so, dial 911.
- 2.** If you are safe to do so, use one of the 5Ds to intervene and stop the harassment.
- 3.** Check in with the victim of harassment. Let them know that Homes for Good will investigate the incident and will follow up with them about potential actions. Provide them with:

Hate & Bias Resources Handout

- 4.** Ask the victim to complete the Hate & Bias Incident Complaint Form. If the victim or witnesses are unwilling to complete the written form, ask them to provide a written statement. If they refuse to provide a written statement, take a verbal statement describing the incident and complete the Hate & Bias Complaint Form on their behalf, making note of their refusal.

Hate & Bias Incident Complaint Form

- 5.** Obtain any relevant documentation including but not limited to:
 - o Hate & Bias Incident Complaint Form from the victim
 - o Hate & Bias Incident Complaint Form from any witnesses if possible
 - o Police Report if applicable
 - o Any other relevant evidence
- 6.** Notify your manager. If your manager is the accused party, notify your Division Director or Human Resources representative.
- 7.** Complete the Hate & Bias Incident Reporting Form, uploading the Hate & Bias Incident Complaint Form(s) completed by the victim and/or witnesses and any other relevant documentation. This will notify the leadership team that a hate & bias incident occurred and may require follow-up action.

Hate & Bias Reporting Form

Submit the hate & Bias Incident Reporting Form as soon as possible by filling out the digital form. Ideally, the victim and witnesses would have completed the Hate & Bias Incident Complaint Form. If they have not, don't wait on statements or complaint forms from the victim(s) and/or witness(es) to submit the Hate & Bias Incident Reporting Form. Follow up with them if they have not submitted documentation within three (3) business days. You can follow up and submit documentation at a later date if necessary.

APPENDIX 2

8. Provide the victim with the Participant Complaint Response Letter

Participant Hate & Bias Witnessed Response Letter Template

Note: Steps 7 and 8 above are distinguishable and important but can be performed independently of each other. They do not need to be followed sequentially. You may choose to perform them in any order that best suits your workflows in the specific circumstance.

9. Internal Referral:

Send a referral to the Resident Services department to offer support to the victim and to connect the perpetrator with educational opportunities.

If the victim or accused party is engaged with Homes for Good Case Management, the Case Manager should be notified.

10. The Program/Department Manager will determine an appropriate action in response to the incident (for example, escalated lease enforcement, participant coaching sessions etc.). Depending on the results of the investigation, progressive lease enforcement steps to address concerns may need to be followed and documented. Any notices issued should specifically reference the incident, but should not reference any identifying details provided by the victim or witnesses to maintain confidentiality to the extent possible.
11. The Manager or reporting employee will provide updates to the victim no less frequently than every two weeks while the investigation is being conducted.
12. Once the appropriate action has been taken, the Manager or reporting employee will follow up with the victim verbally and in writing using the Participant Complaint Follow Up Closure Letter Template to inform them of action taken and encourage them to report any subsequent harassment that may require further escalated enforcement.

Participant Complaint Follow Up Closure Letter Template

13. The Manager or reporting employee will follow up with the victim periodically over 14-30 days following closure to ensure that no additional incidents have occurred.

APPENDIX 3

Staff Procedure - When a team member receives a report of a hate & bias incident occurring in a Homes for Good community from a resident, participant or visitor

1. Ask the reporting person to complete a Hate & Bias Incident Complaint Form, and inform them that their information will be kept confidential to the extent possible.

Hate & Bias Incident Complaint Form

If the victim is unwilling to complete the Hate & Bias Incident Complaint Form, ask them to provide a written statement. If they refuse to provide a written statement, take a verbal statement describing the incident and complete the Hate & Bias Incident Complaint Form on their behalf.

2. Provide the victim with the Hate & Bias Resource Handout

Hate & Bias Resource Handout

3. Notify your manager. If your manager is the accused party, notify your Division Director or a Human Resources representative.

4. Investigate the complaint:

When taking statements, use the 5 Ws of investigation (Who? What? When? Where? Why?)

- a. Ask the complainant any clarifying questions.
 - b. Speak with the person being accused.
 - c. Speak with any witnesses or potential witnesses to the incident (this may include other community members and/or Homes for Good staff).
 - d. Gather all relevant evidence including but not limited to written records, photos, videos, public records, police reports if reported to law enforcement).
5. Submit the Hate & Bias Incident Reporting Form as soon as possible. Don't wait for statements or incident reports from the victim or witnesses to submit the report. Follow up with them if they have not submitted documentation within three (3) business days.

Hate & Bias Incident Reporting Form

6. Provide the victim with the Participant Hate & Bias Complaint Response Letter.

Participant Hate & Bias Complaint Response Letter Template

Note: Steps 4 - 6 above are distinguishable and important but can be performed independently of each other. They do not need to be followed sequentially. You may choose to perform them in any order the best suits your workflows in the specific circumstance.

APPENDIX 3

7. Internal Referral:

Send a referral to the Resident Services department to offer support to the victim and to connect the perpetrator with educational opportunities.

If the victim or accused party is engaged with Homes for Good Case Management, the Case Manager should be notified.

8. The Program/Department Manager will determine an appropriate action in response to the incident (for example, escalated lease enforcement, participant coaching sessions etc.). Depending on the results of the investigation, progressive lease enforcement steps to address concerns may need to be followed and documented. Any notices issued should specifically reference the incident but should not reference identifying details provided by the victim or witnesses to maintain confidentiality to the extent possible.
9. The Manager or reporting employee will provide updates to the victim no less frequently than every two weeks while the investigation is being conducted.
10. Once the investigation is complete and the appropriate action has been taken, the Manager or reporting employee will follow up with the victim verbally and in writing, utilizing the Participant Complaint Response Follow Up Closure Letter Template to inform them of action taken and encourage them to report any subsequent harassment that may require further escalated enforcement.

If the allegations reported are not corroborated, the staff member who received the report, or the Manager must communicate the uncorroborated finding to the complaining party in writing using the Participant Complaint Response Follow Up Closure Letter Template.

Participant Complaint Response Follow Up Closure Letter Template

11. The Manager or reporting employee will follow up with the victim periodically over the 14-30 days following closure to ensure that no additional incidents have occurred.

Note:

There may be instances when the reporting participant fails to follow up with a completed incident report and/or relevant details about the alleged hate & bias incident. In the event the participant has not provided the information necessary to complete an investigation, the Complaint More Information Letter can be used to document the Agency's attempt to gather necessary information.

Complaint More Information Letter Template

APPENDIX 4

Staff Procedure - When a team member witnesses a hate & bias incident against another team member

Hate & bias incidents encompass a broad spectrum of discriminatory behaviors rooted in prejudice against a particular group, whether based on race, religion, gender, or other protected characteristics covered in chapter 1 of this toolkit. These incidents can range from verbal slurs and offensive remarks to acts of vandalism or violence. Workplace harassment, on the other hand, specifically pertains to unwelcome or offensive conduct directed at an individual in a professional setting, often creating a hostile or intimidating work environment. While hate and bias incidents are considered a form of harassment, not all harassment rises to the level of a hate and bias incident. The latter typically involves explicit targeting of an individual or group based on their immutable characteristics, while workplace harassment can manifest in various forms beyond discriminatory motives.

Per the Homes for Good's [**Anti-Discrimination & Harassment Policy**](#), a report of discrimination and/or harassment must be reported to an Agency designee; the employee's immediate manager, Division Director, HR Representative or any member of the leadership team. If you witness a hate & bias incident against a Homes for Good staff member and are not the reporting person's immediate manager, Division Director, HR staff or member of leadership, direct the reporting employee to one of the designees listed above and report the incident to your manager.

- 1.** Determine if the incident is emergent. Is anyone in immediate danger? If so, dial 911.
- 2.** If you are safe to do so, use one of the 5Ds to intervene and stop the harassment.
- 3.** Document the incident.
 - Complete the Hate & Bias Incident Complaint Form
 - Encourage the victim to complete a report as well
 - Ask any other witnesses to complete the Hate & Bias Incident Complaint Form or provide a written statement. If they refuse to provide a written statement, take a verbal statement describing the incident and complete the Hate & Bias Incident Complaint Form on their behalf, making note of their refusal.

Hate & Bias Incident Complaint Form

- 4.** Notify your manager immediately. If your manager is the accused party, notify your Division Director or a Human Resources representative.
- 5.** Submit the Hate & Bias Incident Reporting Form as soon as possible. Don't wait for statements or incidents reports from the victim or witnesses to submit the report. A Human Resources representative will follow up with the victim and any witnesses if necessary.

Hate & Bias Incident Reporting Form

APPENDIX 4

6. The Manager, Director or Human Resources representative will provide the victim with the following resources, and let them know that Homes for Good will investigate the incident and will follow up with them about potential actions:

[Anti-Discrimination & Harassment Policy](#)

[Employee Assistance Program Flyer](#)

[Employee Hate & Bias Incident Witnessed letter Template](#)

7. The Manager, Director or Human Resources representative will inquire about what the employee may need (TM, temporary adjusted assignment etc.).
8. The Manager or Director will contact Human Resources about potential immediate actions that should be taken to protect the victim of harassment.
9. If applicable, the Manager, Division Director in partnership with Human Resources, will determine an appropriate action in response to the incident (for example, escalated lease enforcement, participant coaching sessions etc.). Depending on the results of the investigation, progressive lease enforcement steps to address concerns may need to be followed and documented. Any notices issued should specifically reference the incident but should not reference any identifying details provided by the victim or witnesses to maintain confidentiality to the extent possible.

Note: In the event the accused party is a Homes for Good employee, formal disciplinary action may be necessary if an investigation substantiates the allegation(s). Homes for Good will follow all policies and requirements regarding discipline and discharge, per Agency policy and the Collective Bargaining Agreement.

10. Internal Referral:

- Send a referral to the Resident Services department to offer support to the victim and to connect the perpetrator with educational opportunities.
- If the victim or accused party is engaged with Homes for Good Case Management, the Case Manager should be notified.

11. The Manager, Director or Human Resources representative will provide updates to the victim no less frequently than every two weeks while the investigation is being conducted.
12. Once appropriate action has been taken, the Manager, Division Director or HR representative will follow up with the victim both verbally and in writing utilizing the employee Complaint Response Closure Letter Template, to inform them of action taken and encourage them to report any subsequent harassment that may require escalated enforcement.

[Employee Complaint Response Closure Letter Template](#)

APPENDIX 4

- 13.** The Manager, Division Director or HR representative will follow up with the victim periodically over the 14 - 30 days following closure to ensure that no additional incidents have occurred.

APPENDIX 5

Staff Procedure - When a team member receives a report of a hate & bias incident against another team member

Hate & bias incidents encompass a broad spectrum of discriminatory behaviors rooted in prejudice against a particular group, whether based on race, religion, gender, or other protected characteristics covered in chapter 1 of this toolkit. These incidents can range from verbal slurs and offensive remarks to acts of vandalism or violence. Workplace harassment, on the other hand, specifically pertains to unwelcome or offensive conduct directed at an individual in a professional setting, often creating a hostile or intimidating work environment. While hate and bias incidents are considered a form of harassment, not all harassment rises to the level of a hate and bias incident. The latter typically involves explicit targeting of an individual or group based on their immutable characteristics, while workplace harassment can manifest in various forms beyond discriminatory motives.

Per the Homes for Good's [Anti-Discrimination & Harassment Policy](#), a report of discrimination and/or harassment must be reported to an Agency designee; the employee's immediate manager, Division Director, HR Representative or any member of the leadership team. If you witness a hate & bias incident against a Homes for Good staff member and are not the reporting person's immediate manager, Division Director, HR staff or member of leadership, direct the reporting employee to one of the designees listed above and report the incident to your manager.

1. If you are not one of the listed designees, encourage the victim to report the incident to their manager, Division Director or Human Resources representative, and report the discussion to your manager immediately.
2. If you are one of the appropriate designees listed above, ask the reporting person to complete the Hate & Bias Incident Complaint Form

Inform the team member that their information will be kept confidential to the extent possible.

If they are unwilling to complete the written Hate & Bias Incident Complaint Form, ask them to provide a written statement. If they refuse to provide a written statement, take a verbal statement describing the incident and complete the Hate & Bias Incident Complaint Form on their behalf.

Hate & Bias Incident Complaint Form

3. Notify your manager immediately. If your manager is the accused party, notify your Division Director or a Human Resources representative.
4. Submit the Hate & Bias Incident Reporting Form as soon as possible. Don't wait for statements or incidents reports from the victim or witnesses to submit the report. A Human Resources representative will follow up with the victim and any witnesses if necessary.

Hate & Bias Incident Reporting Form

APPENDIX 5

5. Human Resources staff will assign an investigator (Manager, Director, HR Staff or outside third-party), and will provide the employee with the following, and inform them that Homes for Good will investigate the incident and will follow up about any potential actions:

Anti-Discrimination & Harassment Policy

Employee Assistance Program Flyer

Employee – Complaint Response Opening Letter Template

6. The Manager, Division Director or Human Resources representative will inquire about what the employee may need (TM, temporary adjusted assignment etc.). The Manager will contact Human Resources about potential immediate actions that should be taken to protect the victim of harassment.
7. The assigned investigator will investigate the complaint by:
 - Asking the complainant any clarifying questions.
 - Speaking with the person being accused.
 - Speaking with any witnesses or potential witnesses to the incident (this may include other community members and/or Homes for Good staff).
 - When taking statements, use the 5 Ws of investigation (Who? What? When? Where? Why?).
 - Gathering all relevant evidence including but not limited to written records, photos, videos, public records, police reports if reported to law enforcement).
8. The investigator will request any relevant public records (i.e. police report if the incident was reported to law enforcement).
9. The investigator will make a recommendation regarding appropriate action in response to the incident (for example, escalated lease enforcement, participant coaching sessions etc.). Depending on the results of the investigation, progressive lease enforcement steps to address concerns may need to be followed and documented. Any notices issued should specifically reference the alleged incident but should not reference any identifying details provided by the victim or witnesses to maintain confidentiality to the extent possible.
10. The investigator or HR representative will provide updates to the victim no less frequently than every two weeks while the investigation is being conducted.
11. Once the investigation is complete and action has been taken, the employee's direct manager, Division Director or HR representative will follow up with the victim verbally and in writing utilizing the Employee Complaint Response Closure Letter Template to inform them of action taken and encourage them to report any subsequent harassment that may require further escalated enforcement.

Employee Complaint Closure Letter Template

APPENDIX 5

12. Internal Referral:

- Send a referral to the Resident Services department to offer support to the victim and to connect the perpetrator with educational opportunities.
- If the victim or accused party is engaged with Homes for Good Case Management, the Case Manager should be notified.

12. The employee's Manager, Director or HR representative will follow up with the victim periodically over the 14-30 days following closure to ensure no additional incidents have occurred.

Note: all hate & bias incidents against a Homes for Good employee should be reported to Human Resources immediately to determine if immediate measures should be put in place to protect the victim of harassment.

In the event the accused party is a Homes for Good employee, formal disciplinary action may be necessary. Homes for Good will follow all policies and requirements regarding discipline and discharge, per Agency policy and the Collective Bargaining Agreement.

APPENDIX 6

Staff Procedure - When a team member discovers property damage, vandalism or posted materials on Agency property motivated by hate & bias

- 1.** If you are not the Property Manager, notify them immediately.
- 2.** Take photos of the vandalism, damage or posted materials.
- 3.** Complete the [**Hate & Bias Incident Reporting Form**](#) (upload photos taken)
- 4.** Follow the appropriate procedures for removal (maintenance work order, vendor etc.). It may be appropriate to submit an urgent/emergent work order for expedited clean up.
- 5.** External Reporting:

In the event of a criminal hate & bias incident, vandalism or property damage, file a police report, per Property Management procedures.

APPENDIX 7

Staff Procedure - When a Rent Assistance team member receives a report of a hate & bias incident from a participant or applicant

There are instances where Homes for Good's Rent Assistance team members receive reports from participants or applicants who rent or are applying to rent from a private landlord of hate & bias incidents. For example, Rent Assistance team members regularly receive reports from participants of private landlords refusing to consider their tenancy because they are receiving a housing subsidy, which amounts to discrimination on the basis of source of income. In most cases, the issue is resolved by providing education to the landlord.

In the event a Housing Specialist or other Rent Assistance team member receives such a report, the Rent Assistance Civil Rights Complaint Procedure will be followed.

- 1.** Homes for Good Staff person receives a complaint regarding discrimination/Violation of Civil Rights by another party (Landlord, Tenant, Community member, etc.).
- 2.** While speaking w/ the tenant/applicant, the staff person refers them to Fair Housing Council of Oregon (FHCO), Legal Aid, and Springfield Eugene Tenant Association (SETA)-if applicable.
- 3.** Staff person documents the complaint in a Yardi memo, using the comment code 'Civil Rights Complaint' and emails a copy of the HMS note to their Manager immediately.
- 4.** Staff person will make note whether the tenant is living in an Agency owned unit or not.
- 5.** The Manager will then bring the complaint to the attention of the Division Director as soon as possible to discuss a plan of action.
- 6.** Division Director submits a [**Hate & Bias Incident Reporting Form**](#) to document incident and action taken.

APPENDIX 8

Staff Procedure - When a Resident of a Homes for Good Third-Party Managed Community Reports a Hate & Bias Incident

Homes for Good works with third party property management companies to manage a number of affordable housing communities owned by the Agency.

Although this procedure directs complaints of hate & bias at third party managed sites to the community's Property Manager, residents at third party managed sites can also report incidents of hate & bias directly Homes for Good. All reports of hate & bias will be thoroughly investigated.

In the event an incident of hate & bias is reported directly to Homes for Good, the third party management company is not relieved of responsibility to follow the below procedures and any subsequent steps to address hate & bias in their assigned community such as investigating the complaint and progressive lease enforcement actions.

Homes for Good's Asset Management Department will be the primary contact for third party management companies.

1. The third-party Property Manager will use the Hate & Bias Incident Complaint Form to document the allegation.

Hate & Bias Incident Complaint Form

2. The third-party Property Manager will complete an investigation.
 - Asking the complainant any clarifying questions.
 - Speaking with the person being accused.
 - Speaking with any witnesses or potential witnesses to the incident (this may include other community members and/or Homes for Good staff).
 - When taking statements, use the 5 Ws of investigation (Who? What? When? Where? Why?).
 - Gathering all relevant evidence including but not limited to written records, photos, videos, public records, police reports if reported to law enforcement).
3. The third-party Property Manager will send the Hate & Bias Incident Complaint Form and supporting documentation to a designated representative of Homes for Good's Asset Management department.
4. The designated representative of Homes for Good's Asset Management department will complete the Hate & Bias Reporting Form to notify leadership and capture data related to the incident.

Hate & Bias Incident Reporting Form

APPENDIX 8

- 5.** The designated representative of Homes for Good's Asset Management department will complete a referral for Resident Services when appropriate.

Internal Referral – if the accused party is a Homes for Good resident or participant:

- Send a referral to the Resident Services department if the accused party is a resident.
 - If the accused party is engaged with Homes for Good Case Management, the report will be sent to the assigned Case Manager.
- 6.** The designated representative of Homes for Good's Asset Management department will ensure that the third-party Property Manager completes the following steps to acknowledge and address the complaint:
 - Acknowledge the complaint in writing
 - Investigate the complaint
 - If substantiated, action is taken to address the complaint.
 - Documentation & follow-up

APPENDIX 9

External Reporting

In the event the hate & bias incident is a crime, reporting to law enforcement may be necessary.

Chapter 1 of this toolkit outlines the differences between a hate & bias crime and a non-criminal hate & bias incident.

When to Report a Hate & Bias Crime to Law Enforcement

Homes for Good team members should report hate & bias crimes to law enforcement when:

- They are in immediate danger
- A resident, participant, visitor or team member is in immediate danger
- A crime is being committed against the Agency (i.e. vandalism, property damage)

If the victim of the hate & bias crime is not the Agency, you should not contact the police unless you've checked with the victim and they've explicitly asked you to call the police on their behalf or there is an imminent threat to the safety of staff and/or participants.

Residents who are victims of a hate & bias crime should be encouraged to file a report with law enforcement and will be provided appropriate contact information to do so.

Hate & Bias Resources Handout

When to Report a Hate & Bias Incident to External Parties

There may be times when it's appropriate to report a hate & bias incident, criminal or otherwise, to external parties.

Homes for Good staff members should report hate & bias incidents to the Oregon DOJ and when Homes for Good property has been damaged or vandalized and the motivation is hate & bias related, or if/when Homes for Good is the victim of a non-criminal hate & bias incident such as when offensive signs or flyers have been posted on Agency property which are motivated by hate & bias.

The graphic is a blue and white informational poster for the Oregon DOJ's Bias Response Hotline. At the top, it reads "OREGON DOJ'S BIAS RESPONSE HOTLINE" in white text on a blue background. Below this, it asks "Were you targeted with bias due to your race, color, national origin, sexual orientation, gender identity, disability, or religion?" and encourages reporting. The poster is divided into two main sections: "Call the Hotline" and "Report Online". The "Call the Hotline" section provides the number 1-844-924-BIAS (2427), mentions 240+ interpreters/languages, and lists options for live operator support (Monday-Friday 9am-5pm) and voicemail (after hours). The "Report Online" section provides the website StandAgainstHate.Oregon.gov, mentions 8 languages, and lists options for reporting anytime, requesting a call back, and leaving as much detail as possible. A "-OR-" symbol is placed between the two sections.

OREGON DOJ'S BIAS RESPONSE HOTLINE
Were you targeted with bias due to your race, color, national origin, sexual orientation, gender identity, disability, or religion?
Make a report, receive support, learn about your options.

Call the Hotline
1-844-924-BIAS (2427)
240+ Interpreters/Languages
We Accept All Relay Calls

Live Operator
• Monday - Friday 9am - 5pm
• Receive support
• Options for next steps
• Options for community support

Leave a Voicemail
• After Hours
• Request a call back
• Leave as much or as little detail as you'd like

Report Online
StandAgainstHate.Oregon.gov
8 Languages
Additional Languages Upon Request

↓

• Make a report anytime
• Request a call back
• Leave as much or as little detail as you'd like

Relevant Community Organizations

There may be times when it's appropriate to refer participants, residents and/or visitors to specific relevant community organizations that may be able to offer support beyond Homes for Good's purview. See Appendix 11 for contact information and links to community organizations that may be able to offer supports to victims of hate & bias incidents.

APPENDIX 10

Incident Follow Up

Following the immediate response to a hate and bias incident, our community adopts a "hotwash" procedure to swiftly assess and learn from the incident response. This concise yet thorough evaluation involves key stakeholders, including staff members and relevant community representatives, engaging in a structured debriefing session.

The hotwash allows us to analyze the effectiveness of our response in real-time, identify areas of improvement, and capture valuable insights for future incident management. By promptly conducting this post-incident review, we enhance our ability to adapt, refine procedures, and continually strengthen our community's capacity to address hate and bias incidents with efficiency and sensitivity.

The hotwash discussion will be facilitated by the Property Manager, Program Manager or Division Director of the affected department.

[After Action Meeting Agenda Template](#)

APPENDIX 11

Resources

Intervention Resources

Right-to-Be 5 Ds of Bystander Intervention

Jennifer McCary, “Teaching Bystanders to Intervene” - Jennifer McCary of Gettysburg College talks about encouraging bystander intervention to prevent violence. Civility, she argues, is an essential decision that must be taken proactively in order to make our communities into safer and happier places.

https://www.youtube.com/watch?v=3iY_X4O-wno

Maeril, Huge, “What to do if you are Witnessing Islamophobic Harassment” – an illustration of four steps to intervening when witnessing harassment publicly.

<https://vimeo.com/192150862>

Southern Poverty Law Center, “SpeakUp: Standing Up to Everyday Bigotry” - The Southern Poverty Law Center gathered hundreds of stories of everyday bigotry from people across the United States. Included are tips for speaking up in different scenarios – families, workplace, school, and more.

<https://www.splcenter.org/20150125/speak-responding-everyday-bigotry>

Templates, Forms & Other Homes for Good Resources

[Anti-Discrimination & Harassment Policy](#)

[Employee Assistance Program \(EAP\) Flyer](#)

[Hate & Bias Incident Complaint Form](#)

[Hate & Bias Incident Reporting Form \(Digital\)](#)

[Hate & Bias Reporting Resources Handout](#)

[Participant - Complaint Response Letter Template](#)

[Participant - Hate & Bias Witnessed Letter Template](#)

[Participant - Complaint Response Follow Up Closure Letter Template](#)

[Employee - Complaint Response Opening Letter Template](#)

[Employee - Hate & Bias Witnessed Response Opening Letter Template](#)

[Employee - Complaint Response Closure Letter Template](#)

[Complaint More Information Letter Template](#)

[Employee - Complaint Response Opening Letter Template to Accused](#)

[Employee - Complaint Response Closure Letter Template to Accused \(not substantiated\)](#)

[After Action Meeting Agenda Template](#)

[Notice PIH 2014-20](#)

External Agencies

[Oregon Department of Justice \(DOJ\)](#)

[Department of Housing & Urban Development \(HUD\)](#)

[Fair Housing Council of Oregon \(FHCO\)](#)

Community Organizations

[NAACP](#)

[Plaza de Nuestra Comunidad](#)

[Transponder](#)

[Eugene Human Rights Commission](#)

[HIV Alliance](#)

[Asian Pacific American Network of Oregon](#)

[Springfield Eugene Tenant Association \(SETA\)](#)

[Community Alliance of Lane County](#)

[Catholic Community Services](#)



BOARD OF COMMISSIONERS AGENDA ITEM

BOARD MEETING DATE: 07/24/2024

AGENDA TITLE: Strategic Equity Plan Year II Review

DEPARTMENT: Executive

CONTACT : Jasmine Leary Mixon

EXT: 2501

PRESENTER: Homes for Good Leadership Team

EXT: --

ESTIMATED TIME : 30 minutes

- ORDER/RESOLUTION
- PUBLIC HEARING/ORDINANCE
- DISCUSSION OR PRESENTATION (NO ACTION)
- APPOINTMENTS
- REPORT
- PUBLIC COMMENT ANTICIPATED

Approval Signature

EXECUTIVE DIRECTOR:

A handwritten signature in black ink, appearing to be "JLF", is written over a horizontal line.

DATE: 07.18.2024

LEGAL STAFF :

DATE:

MANAGEMENT STAFF:

DATE:



Strategic Equity Plan (SEP) Progress Reporting

July 1s, 2023 – June 30, 2024

TO: Homes for Good Board of Commissioners
FROM: Equity Strategy Team (EST)
TITLE: 2023 – 2024 Strategic Equity Plan Progress Report
DATE: July 24, 2024

I. Introduction

Purpose

The purpose of this memo is to provide a comprehensive update to the Homes for Good Board of Commissioners on the progress made toward achieving the goals outlined in our 2023 - 2024 Strategic Equity Plan (SEP). This plan is structured around four key pillars: Listen to Our Communities, Tell the Human Story, Create Pathways to Self-Sufficiency, and Lead & Grow Ethically. Each team within our organization has set specific goals aligned with these pillars, and individuals within those teams have further tailored their efforts to support these overarching objectives. This memo aims to summarize the advancements and achievements in each of these areas, highlight challenges faced, and outline opportunities for continued progress and improvement. By presenting this information, we seek to demonstrate our commitment to diversity, equity and inclusion and to ensure transparency and accountability in our efforts.

Background

Homes for Good's Strategic Equity Plan (SEP) is unlike other strategic plans in that it infuses our Diversity, Equity & Inclusion goals in a larger strategic plan to ensure our efforts are steering us in the direction of more equitable and inclusive services, communities and work environments. The SEP serves as an annual plan that outlines our goals and the tactics we will execute to achieve those goals. Team and individual goals are aligned with one of our "pillars" that guide this work; Listen to our Communities, Tell the Human Story, Create Pathways to Self-Sufficiency, and Lead & Grow Ethically.

II. Pillar 1: Listen to Our Communities

Homes for Good lives within the sphere of our community and cannot be separated from that context. In order to be a responsible community organization, we must collaborate, and most importantly listen, to other organizations and people within our community.

We must base operational changes on what we learn from the experiences of organizations with which we collaborate, the people we serve and the greater community. The goals and tactics outlined in this section focus on local partnerships and collaboration.

Division Goals & Progress

- *Rent Assistance*
 - Seek Feedback – 45% Complete
 - Service center survey is currently being offered and utilized by in person visitors.
 - Local Preference Partnership Optimization – 74% complete
 - Meetings held with key partners
 - Materials have been created for Local Preference partner training
 - Metrics have been established to evaluate LP, including a final evaluation spreadsheet and reporting procedures.
 - Process Improvements – 70% complete
 - 90+% of planned improvements to the Waitlist process using Waitlist Connect (WLC) data have been made.
 - Communication published about populations served using WLC data.
 - Advancing Access – 76% complete
 - We have continued to participate in the Emergency Housing Voucher (EHV) cohort, using data to guide program changes.
 - Implemented 1-on-1 in person support at pop up sites for waitlist openings in rural communities at local culturally specific organizations.
 - Highlight Success Stories – 45% complete
 - Working with SEP work group on adding questions to participant survey to solicit success stories.
- *Supportive Housing*
 - Expanding Current Programs – 78% complete
 - Expand youth programming to include Youth Internships with Connected Lane County, and Adulting 101 class for teens. Received Teen Empowerment grant from City of Eugene to continue teen programming through FY25.
 - Population based food programming has been implemented in partnership with Food for Lane County and new funds have been received to increase access across portfolio.
 - Refine and improve emergency response procedures – property specific procedures created in coordination with residents and resident councils.
 - Increase Tools to Combat Discrimination in our Housing – 72% complete
 - Hate & Bias procedure has been developed and staff have been trained.
 - Investigation and leave enforcement procedures have been refined and aligned with the hate & bias procedure.
- *Real Estate*
 - 3rd Party Managed Community Service Improvements – 25% complete
 - Visioning & ideation sessions have been held with Asset Management, Resident Services & 3rd party leadership.
 - Accessibility – 47% complete
 - Listening sessions at target properties have been held.
 - A written plan is currently being drafted utilizing feedback from listening sessions, implementing universal design and accessibility features for new developments.
 - Combat Discrimination in our Housing – 53% complete
 - A hate & Bias procedure has been created, and a process for responding to incidents at 3rd party sites is being developed including the creation of a crisis team to address instances of hate & bias.
- *Energy Services*
 - Process Improvements – 75% complete

- We updated Weatherization application on the website has been drafted. We're currently converting the application to a digital form and revising intake procedures accordingly.
- Targeted Outreach – 100% complete
 - Program outreach has been completed to highest need populations based on the Climate & Economic Justice Mapping tool
 - We attended two events providing education about our programs; one in Partnership with the 4J School District for Latinx families and hosted one Weatherization workshop in partnership with Fossil Free Eugene.
- Shared Services & Executive
 - Human Resources – Drive Change Utilizing Engagement Survey Results – 75% Complete
 - Ideation & calibration sessions complete to identify most impactful change
 - New newsletter article created based on feedback.
 - Learning & development opportunities have been implemented or will be based on feedback.
 - IT – Support Other Division Tactics
 - We supported the communications team in public facing communications about the software migration and impacts to people we serve.
 - We helped the communications team improve website functionality using data to improve the user experience.

III. Pillar 2: Tell the Human Story

The people we serve are the heart of our work. As a social service organization, we work for and with people. The goals and tactics outlined in this section focus on keeping a human-centered approach. They include efforts to gather participant feedback and use that in programmatic changes, amplify voices on our social media platforms, and improve empathy and client interactions for non-client facing team members.

Division Goals & Progress

- Rent Assistance
 - Further Landlord Education & Relationships – 50% complete
 - Hosted three events for Landlord education.
 - Attended the Multifamily NW Prism Education Conference.
 - An avenue for celebrating landlords has been created.
- Supportive Housing
 - Staff Engagement & Cross Division Support – 89% complete
 - A quarterly event calendar has been published so staff & board members can participate in client facing events.
 - A plan has been developed and implemented to create staff volunteer opportunities at Community Night Out & Spring Spruce Up Events. This has resulted in:
 - 76 total events
 - 61 volunteer opportunities for 46 non-client facing team members
 - Communications have been published to residents about Yardi software implementation and it's impacts on the people we serve and support events have been held at all properties to connect residents to new portals.
 - Worked with The Real Estate team to create a shared 3 way MOU and two combined trainings or community events.
- Shared Services & Executive
 - Communications – Highlight Businesses & Contractors – 100% complete

- Internal and external campaigns have been published via newsletter and social media highlighting businesses and contractors we work with & resident owned businesses.
- Bid procedure has been updated and is awaiting implementation.

IV. Pillar 3: Create Pathways to Self-Sufficiency

We usually associate “self-sufficiency” with our Family Self-Sufficiency Program,” but creating pathways to self-sufficiency looks to improve more than just one program.

Through execution of the goals and tactics outlined in this section, we strive to make progress and programmatic improvements to promote wealth building, and improve the mental, physical and financial health of our residents and program participants.

Division Goals & Progress

- *Supportive Housing*
 - Optimize Resident Communication & Resource Sharing – 82% Complete
 - Communications about Resident Advisor Board (RAB) and its meetings have been published through flyers and social media posts to increase representation from sites not currently represented like PSH and PBV.
 - We’ve utilized resident newsletters to highlight organizations that are close to 3rd party sites and resources they provide, and to promote events for culturally specific communities.
 - Digital and print resources have been developed and implemented highlighting community resources such as DaisyChain, Parenting Now etc. for youth & parenting needs.
 - A plan is being developed to allow access to FSS funds for anyone in the household to utilize a certificate payment.
 - FSS improvements currently in process include tracking advisory committee meeting attendance by partners to measure community representation, and an “opt-out” model for FSS programs at PSH sites.
 - Basic Needs – Environmental Safety, Transportation, Internet Access & Food Security – 60% complete
 - We have applied for funding to add air conditioning or Ductless Heat Pumps at properties without cooling and DHP’s are currently being installed at two sites to increase access to cooling centers during inclement weather.
 - We have partnered with the Toolbox Project and other organizations for bike repair events and resident educational opportunities including opportunities for Spanish speakers.
 - We have assessed resident needs and set property specific goals for internet and device access for health, employment, education and self-sufficiency activities. Funds have been received to add additional computers and internet to community spaces.
 - We’ve expanded our food programs to address food insecurity in our communities in partnership with Food for Lane County that is tailored to population served and are working with FFLC to set up a central food pantry for shelf-stable food for resident access.
- *Real Estate*
 - Development – Determine Which Types of Housing Have the Most Impact – 17% complete
 - We participated in rental housing redesign and resource engagement series.
- *Shared Services & Executive*
 - Executive – Meaningful Outreach – 75% complete

- We have created an outreach plan and executed an outreach plan to reach Housing Choice Voucher participants for future board recruitments.
- We had met with UO and LCC to maintain relationships for internships and LCC pathways.
- We have ensured that at least 50% of food purchases for events are from local small businesses.
- Communications – Foundation Scholarship Education – 75% complete
 - A series of advertisement campaigns highlighting specific uses of Homes for Good Foundation Scholarship have been created. We are waiting on more stories of people using the scholarship for vocational programs, and plan to publish the campaign in August 2024.
- IT – Support Other Division Tactics
 - We collaborated with the Supportive Housing Division to access and set goals for internet and device access for health, employment, education and other self-sufficiency activities.

V. Pillar 4: Lead & Grow Ethically

Leading & growing ethically means we will lead the way in creating a racially and socially just organizational culture. The goals and tactics outlined in this section focus on improving our employee experience, recruiting and retaining a diverse workforce, utilizing technologies to provide more access to our programs, and reducing the Agency's carbon footprint.

Division Goals & Progress

- *Rent Assistance*
 - Participant Education – 100% complete
 - An educational workshop for participants about the recertification process has been executed.
 - The team is currently working with IT to use EHV service fee funds to purchase tech resources for group training needs and future participant workshops.
 - Optimize Move to Work (MTW) Designation – 59% complete
 - We have engaged in MTW cohorts to identify and optimize MTW flexibilities.
 - We have continued to work with HUD PDX and HUD DC on the disconnect between HUD's and the State of Oregon's definition of registered sex offender with the goal of amending the goal to align with the tiered sex offender ranking system in Oregon.
 - Collaboration with MTW Consultant and Sponsors on draft language to provide access to housing for RSO MTW Waiver.
- *Supportive Housing*
 - Maximize Accessibility of Programs & Services – 71% complete
 - 100% of vital documents have been translated into Spanish.
 - We've increased the front line staff who are bilingual in Spanish from 12% to 14%.
 - We've collaborated with the Accommodations Coordinator to revise reasonable accommodations procedures to be routed to Property Managers directly to expedite simple requests.
 - We have reviewed and reported access to community room technical resources in our communities and have received funding to expand equipment and access in our community rooms.
 - We have provided resident support sessions across the portfolio to introduce residents to new Yardi tenant portals.

- We are currently collaborating with the Real Estate team to publish an accessibility report based on a survey conducted to make it easier for people who need accessible units to get them.
- Research Viability of Programmatic Changes – 93% complete
 - We continue to research the viability and cost of self-managing Permanent Supportive Housing (PSH) communities, keeping in mind the context of how PSH communities will differ from Public Housing communities.
 - We have finalized the management plan for Bridges on Broadway as an initial self-managed PSH community to open in 2025.
 - We have entered into contracts with QMHP provider for clinical support services as well as a contract with Pacific Source for Medicaid billing for Traditional Health Worker services.
- Energy Services
 - Sustainability & Resiliency – 75% complete
 - We have used the Climate & Economic Justice Map to identify the most vulnerable populations and plan to use data for waitlist prioritization and targeted outreach.
 - We continue to utilize funding from the Community Heat Pump Deployment Program and the Landlord Cooling Space initiative to provide AC or cooling centers to people in our housing.
 - We have identified and applied for a grant to begin the process of electrifying our Energy Auditor fleet.
 - We are working on procuring a consultant to identify climate justice and carbon reduction grants to develop an internal sustainability and carbon neutrality strategy for the next five years.
- Shared Services & Executive
 - Human Resources – Hiring Process Project – 100% Complete
 - We executed focus groups with hiring managers to seek their feedback.
 - A subcommittee of the EST developed written procedures based on hiring manager feedback, including an implicit bias training requirement and candidate feedback mechanism.
 - We providing training on the process to hiring managers and staff members.
 - Human Resources - Onboarding Improvements – 80% Complete
 - We created a new hire training plan for each classification.
 - We built in introduction to the EST and safety committee into the first 9-month onboarding experience.
 - We've adjusted language in onboarding materials to allow new team members to indicate their preferred names for public settings such as the HRIS and email, while ensuring legal names are discreetly used only for necessary documentation like payroll & benefits if they choose.
 - Human Resources -Learning & Development – 68% complete
 - A training series was delivered to staff in Partnership with Transponder to promote gender inclusion in the workplace.
 - We worked with consultants to conduct team building and capacity building sessions aimed at enhancing the connections and relationship between our middle managers and the executive leadership team.
 - Human Resources - Holistic Wellness Benefit – 90% complete
 - We introduced a new benefit – DevNW Financial Foundations at work to provide wealth building resources to team members.

- We continue to evaluate and update our hybrid work plan to offer flexibility and accessibility to classifications that can work remotely.
- Communications – Preparedness – 100% complete
 - In partnership with Safety Committee and Office Coordinator, we create educational campaign about individual and family preparedness for employees, and vulnerabilities of the Administrative Office building.
- Finance – Process Optimization 76% complete
 - We worked with utilities to convert to paperless billing.
 - We developed a plan to expand service deliver to residents, landlords and applicants through Yardi features.
- Finance – Execute Moss Adams Recommendations 33% complete
 - We adjusted division of duties to designate an AP staff member.
 - We are working on updating policies and procedures.
 - We are developing a calendar with daily, weekly, monthly and annual tasks including drawdowns, payroll and required filings.
- IT – Support Other Division Tactics
 - We supported the Finance team in improving efficiency and capabilities and in improving self-service options for residents, landlords and applicants through the Yardi transition.
 - We helped the programmatic divisions provide training and resident support during the Yardi transition.

Highlights

Several significant accomplishments across our divisions stand out as particularly impactful. In the Rent Assistance division, providing one-on-one support at pop-up sites in rural communities allowed individuals who might not have otherwise had access to our rent assistance programs to learn about the services we offer and apply if they qualified. Additionally, the team held an educational workshop about the recertification process and collaborated with IT to purchase technology that will further enhance our ability to provide educational opportunities to those in our programs. They also worked with the Move to Work (MTW) cohort to optimize program flexibilities and addressed discrepancies between HUD and Oregon's definitions of registered sex offenders.

The Supportive Housing division made strides by creating an events calendar and publishing communications inviting staff in non-client-facing roles to volunteer for events such as food programming, Community Night Out, and Spring Spruce-Up Days. This initiative has been popular among staff from all divisions, resulting in 46 team members volunteering and strengthening their connection to our mission. The team also expanded food programming to address food insecurity in partnership with Food for Lane County and is working on setting up a central food pantry for residents to access shelf-stable food. Additionally, a new procedure was implemented to streamline the intake of reasonable accommodation requests, allowing property managers to approve simple and frequent requests without routing them to the Accommodations Coordinator. The Supportive Housing division is also excited about expanding representation on the Resident Advisory Board to include sites not currently represented, such as Permanent Supportive Housing (PSH) and sites with Project-Based Vouchers (PBV).

Furthermore, our Resident Services team expanded youth programming by hosting a youth intern in partnership with Connected Lane County and delivered an "Adulting 101" class for youth in our programs, providing valuable life skills.

The Energy Services team identified the most vulnerable populations using the Climate & Economic Justice Map for waitlist prioritization and targeted outreach and applied for a grant to begin electrifying the Energy Services fleet vehicles.

In the Human Resources division, a project to create and memorialize a hiring process was completed, including a focus on compliance and implicit bias training, redaction of personal information from first-round committee screening, and a feedback mechanism for candidates and hiring managers. The HR team also implemented gender inclusion initiatives, such as a three-part training series with Transponder and updating pre-onboarding materials to allow new team members to indicate their preferred names for public settings while ensuring legal names are used discreetly for necessary documentation. Furthermore, they introduced a new benefits program in partnership with DevNW, providing financial planning resources and training to all team members and their families.

The Communications team focused on improving the website's search functionality to enhance user experience, aligning with our goal to listen to our communities. They successfully communicated important milestones related to the Yardi transition, with four team goals focused on communication, event optimization, highlighting businesses and contractors, and preparedness being 100% completed.

The IT team project managed the Yardi migration, providing essential behind-the-scenes support to all departments affected by the software transition.

Lastly, the creation of the Hate & Bias procedure was a collaborative effort that required significant input and work from all divisions with the Agency. The creation of the procedure and toolkit was a crucial step in addressing the rising reports of hate & bias in our communities. This toolkit educates our staff and third-party management partners, provides a reporting mechanism to ensure leadership is notified of all incidents, outlines detailed procedures to address various forms of hate & bias, and includes a data collection system to track incidents to work toward reducing them over time.

Blockers

Throughout the year, several blockers impacted our progress across various divisions. Leadership turnover in our Real Estate division caused operational constraints, but we are optimistic about the new team structure and grateful to all team members for maintaining operations during this transition.

The Yardi migration presented significant challenges, requiring considerable time and capacity for troubleshooting and adjustments at every step. This transition affected multiple teams, including the Supportive Housing Division, where goals related to rebranding and restructuring the Family Self-Sufficiency program were hindered due to the demands placed on team members by the Yardi transition.

In the Communications team, goals around improving language access on our website were blocked due to the Yardi migration and a hold for reviewing the Language Access plan, which is essential for setting baseline expectations. Additionally, the goal to create a social media campaign for the Homes for Good Foundation Scholarship was paused because no scholarships were awarded to trade or vocational training programs in the last year's round.

The Communications team also faced challenges in supporting other divisions. While they made incremental progress, their ability to provide resources and recommendations was often limited by the pace set by the goal-leading teams.

Overall, these blockers highlight the interconnected nature of our goals and the significant impact that major transitions like the Yardi migration can have across multiple divisions.

Lessons Learned & Looking Ahead

Several key lessons emerged from our experiences this year, offering valuable insights for the future. First and foremost, we learned the importance of not overcommitting and ensuring that our goals are both measurable and realistic, given our available resources and constraints. Overextending our capabilities can lead to incomplete or delayed outcomes, as was evident in some of our goals.

The addition of Permanent Supportive Housing (PSH) services has proven to be a significant and challenging undertaking, demanding increased attention from our shared services teams, particularly HR, IT, and Finance. This highlights the need for careful consideration and planning when integrating large-scale initiatives into our operations.

The Yardi software migration, coupled with finance team restructuring and leadership turnover in our Real Estate division, contributed to some goals experiencing less progress than anticipated. These challenges underscored the interconnected nature of our projects and the impact that major transitions can have on overall performance.

Looking ahead, we will carry forward several goals into the 2024-2025 plan. We will continue to refine and optimize participant feedback mechanisms across all programmatic divisions and third-party managed sites. Expanding representation on our Resident Advisory Board and prioritizing accessibility in our Real Estate portfolio and new developments will remain central to our efforts. Additionally, we will advance hate and bias education in third-party managed communities, create opportunities for participants and landlords to share success stories, and continue our participation in the Move to Work Program, including implementing flexibilities like triennial recertifications. Our Supportive Housing Division will persist in its work toward becoming a Medicaid billing entity.

By applying these lessons and maintaining focus on these ongoing goals, we aim to enhance our strategic planning and execution, ensuring steady progress and continued success in the coming year.

VI. Conclusion

As we reflect on the progress made toward the goals outlined in our 2023 – 2024 Strategic Equity Plan, it's clear that our teams have achieved several noteworthy accomplishments. From enhancing our Rent Assistance to expanding youth programming and developing comprehensive Hate & Bias response procedures, our efforts have made a meaningful impact in our communities and our workplace. These successes highlight our commitment to listening to our communities, telling their stories, creating pathways to self-sufficiency and to leading and growing as an organization and as individuals.

However, we also encountered challenges that affected our progress. The Yardi software migration, leadership transition and other constraints led to some goals experiencing delays or setbacks. Those blockers underscore the importance of aligning our goals with our resources and managing significant changes thoughtfully.

Our experiences this year have taught us valuable lessons about setting realistic objectives and the need for robust support structures when undertaking large initiatives. As we move forward, we are committed to applying these insights to better navigate future challenges and to continue making strides toward completing the goals we set out to accomplish. With a focus on realistic goal-setting and enhanced coordination across teams, we are poised to build on our successes and address the areas that need improvement.

Thank you to everyone who contributed their time and effort to drive our mission forward through doing their part in executing our Strategic Equity Plan!