



City Council Study Session

Agenda

April 25, 2019

6:00 p.m.

Police Station, Prescott Room

219 S. Ivy, Medford, Oregon

1. Downtown Medford Association
 2. Homeless Action Plan
-



City of Medford

Office of the City Manager

Medford ~ A Fantastic Place to Live, Work & Play

To: Medford City Council

From: Eric Zimmerman, Deputy City Manager

Date: 4/19/2019

Re: Study Session Memo- Downtown Medford Association

The Downtown Medford Association (DMA) has been meeting with various city staff and leaders over the last several months as the organization gains momentum in organizing as a voice for downtown interest. DMA has presented to the Parking Commission previously on many of the topics that will be shared during the Study Session.

City Management wanted to provide Council an opportunity to hear from the DMA in a study session to learn more about their efforts and to consider their approach to downtown issues and the "Main Street Program" efforts.

DMA is likely to come to the Study Session with a financial ask nearing \$100,000 for consideration either during the budget process or in future City Council discussions.

Included in this packet are some materials provided by DMA regarding their presentation on Thursday night.

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www.cityofmedford.org

MEMORANDUM

TO: ERIC ZIMMERMAN

FROM: CHRISTIAN NELSON

SUBJECT: MAIN ST PROGRAM/DOWNTOWN MEDFORD ASSOCIATION

DATE: APRIL 19, 2019

CC: CITY COUNCIL

ATTACH: OMS FLYER.PDF; MAIN ST APPROACH.PDF; PROPOSED BUDGET.PDF

In preparation for the upcoming work session I'd like to provide some information pertaining to the Main St Program and give a brief overview of the presentation that is planned.

OMS Flyer – This is a two-page sheet from Oregon's Main St Program which does a good job briefly summarizing the Main Street Approach

Main St Approach – This is a larger article discussing the Main St Approach. If you have time to read or review prior to the meeting that would be great. If not, it can be referenced at a later time.

Proposed Budget – This is a tentative 3-year budget outlining both income and expenditures.

Presentation Outline:

- The Turning Tide
- Places of Concern/Interest
- Brief History of Downtown Medford Assoc
- What's Different This Time
- Main Street Program
- DMA Boundary
- Committee Goals
- Partners
- Revenue Sources
- What We Need From The City Council



Where Place and Time meet

CONTACT INFORMATION

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Main Street 's Economic Success

*Historic Preservation =
Economic Development*

In 2010, Oregon Main Street's "Performing Main Street" level communities (Albany, Baker City, Corvallis, McMinnville, Oregon City, Salem and Roseburg) saw:

- \$15.21 million total public and private investment in physical improvements
- 100 building improvement projects
- 65 net new businesses
- 218 net new jobs
- 12,110 total volunteer hours
- @222,458 monetary value of volunteer hours

Oregon Main Street

Oregon Main Street provides assistance, training, and technical services to communities who want to strengthen, preserve, and revitalize their historic downtown commercial districts. The program is a locally driven process following the proven Main Street Approach® which is a practical and comprehensive model capitalizing on downtown's unique assets. The goal is to build high quality, livable, and sustainable communities that will grow Oregon's economy while maintaining a sense of place. Oregon Main Street is administered by the State Historic Preservation Office (Oregon Parks and Recreation Department).

Main Street
NATIONAL TRUST FOR
HISTORIC PRESERVATION

The Main Street Approach®

The Main Street Approach is a proven comprehensive approach to historic commercial district revitalization. This approach has been implemented in over 2,200 cities and towns in 40 states across the nation with the help of the National Main Street Center and statewide downtown revitalization programs. The success of the Main Street Approach® is based on its comprehensive nature. By fully integrating four points into a practical downtown management strategy, a local program will produce fundamental changes in a community's economic base:

Organization involves building a Main Street® framework that is well represented by business and property owners, bankers, citizens, public officials, chambers of commerce, and other local economic development organizations. Everyone must work together to renew downtown. A strong organization provides the stability to build and sustain a long-term effort.

Promotion creates excitement downtown. Street festivals, parades, retail events, and image development campaigns are some of the ways Main Street® encourages customer traffic. Promotion involves marketing an enticing image to shoppers, investors, and visitors.

Design enhances the attractiveness of the business district. Historic building rehabilitation, street and alley clean-up, colorful banners, landscaping, and lighting all improve the physical image of the downtown as a quality place to shop, work, walk, invest in, and live. Design improvements result in a reinvestment of public and private dollars to downtown.

Economic Restructuring involves analyzing current market forces to develop long-term solutions. Recruiting new businesses, creatively converting unused space for new uses, and sharpening the competitiveness of Main Street's traditional merchants are examples of economic restructuring activities.

Meeting the Needs of Oregon Communities

Oregon Main Street provides assistance to all communities whether they are just beginning to explore options for their downtown or seeking national recognition as an accredited Main Street® town. Currently, there are 72 communities participating in one of the three levels of Oregon Main Street:

Exploring Downtown is for those communities that demonstrate an interest in revitalizing their downtowns and want to learn more about the Main Street Approach®. Interested communities may join at anytime by submitting a letter of intent and completing a brief community assessment survey.

Transforming Downtown is for communities who are committed to downtown revitalization using the Main Street Approach® but need technical assistance to take them to the next level. Application rounds are held as resources permit.

Performing Main Street is for those communities who were previously certified National Main Street cities and those communities with advanced downtown programs following the Main Street Approach®. Application rounds are held as resources permit.



Where Place and Time meet

Why Downtown is Important

1. Historic core of community.
2. Includes unique shopping and service activities.
3. Represents vast amount of public and private investment.
4. Provides a sense of community and place.
5. Reflection of how the community views itself and is a critical factor in business retention and recruitment efforts.
6. Most of the downtown businesses are locally owned.
7. Represents a significant portion of the community's tax base.
8. Serves as an incubator for new businesses.
9. Typically a government center.
10. Often the largest employer in town.

Principles of Main Street

The National Trust Main Street Center's experience in helping communities bring their commercial corridors back to life has shown time and time again that the Main Street Four-Point Approach succeeds. That success is guided by the following eight principles which set the Main Street methodology apart from other redevelopment strategies:

1. **Comprehensive:** A single project cannot revitalize a downtown. An ongoing series of initiatives is vital to build community support and create lasting progress.
2. **Incremental:** Small projects make a big difference. They demonstrate that "things are happening" on Main Street and hone the skills and confidence the program will need to tackle more complex problems.
3. **Self-help:** Although Oregon Main Street can provide valuable direction and technical assistance, only local leadership can initiate long-term success through community involvement and commitment to the revitalization effort.
4. **Public/private partnership:** Successful downtown revitalization organizations must have the support and expertise of both the public and private sectors.
5. **Identifying and capitalizing on existing assets:** local assets provide the solid foundation for a successful, unique downtown revitalization initiative.
6. **Quality:** From storefront design and promotional campaigns to special events, quality must be the main goal.
7. **Change:** Changing community attitudes and habits is essential. A carefully planned downtown program will help shift public perceptions and practices to support and sustain the revitalization process.
8. **Action-oriented:** Successful downtown revitalization programs are pro-active. They plan for the future.

Partners and the Main Street Approach®

Local Main Street Programs must involve groups throughout the community to be successful. Different groups have different interests in the downtown. And, while each may have a particular focus, all groups ultimately share the common goal of revitalizing the commercial district. By involving a broad range of constituents in the process, the downtown program can help each group realize that this common goal exists and that cooperation is essential for successful revitalization. By identifying each group's strengths, the downtown program can help focus that group's energy in the areas where it will be most effective. Groups typically involved in successful local downtown revitalization programs include:

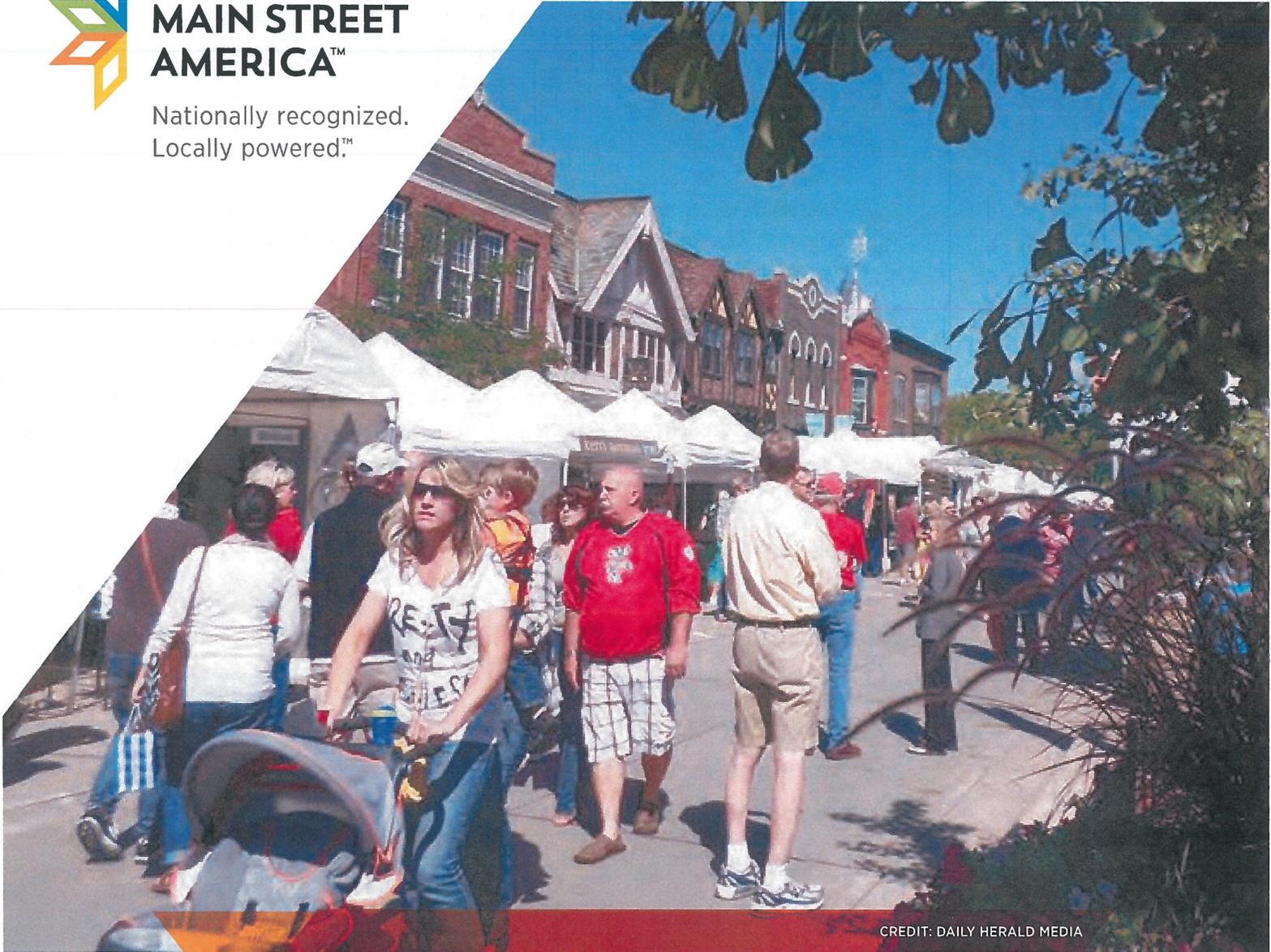
- Retail and Service Sector Businesses
- Property Owners
- Chambers of Commerce
- Financial Institutions
- Consumers
- City and County Government
- Economic Development Officials
- Industries
- Hospitals
- Media
- Utilities
- Historic Societies and Historic Preservation Groups
- Civic Organizations
- Schools

"all of us, if we are reasonably comfortable, healthy and safe, owe immense debts to the past. There is no way of course, to repay the past. We can only repay those debts by making gifts to the future." Jane Jacobs



MAIN STREET AMERICA™

Nationally recognized.
Locally powered.™



CREDIT: DAILY HERALD MEDIA

THE MAIN STREET APPROACH: A COMPREHENSIVE GUIDE TO COMMUNITY TRANSFORMATION



**KNIGHT
FOUNDATION**



**National Trust for
Historic Preservation***

Main Street America™ has been helping to revitalize older and historic commercial districts since the late 1970s. Today, it is a movement consisting of more than 1,600 neighborhoods and communities, rural and urban, who share both a commitment to place and to building stronger communities through preservation-based economic development.

Main Street America is a program of the nonprofit National Main Street Center, a subsidiary of the National Trust for Historic Preservation.

The Main Street Approach: A Guide to Comprehensive Commercial District Transformation was co-written with Kennedy Smith and Josh Bloom of Community Land Use + Economics Group.

This guide was shaped by input from the National Main Street Center (NMSC) board-appointed Four Point Refresh Task Force. The Task Force was led by Main Street veteran and NMSC Board Member Mary Thompson.

FOUR POINT REFRESH TASK FORCE

MARY THOMPSON Task Force Chair, Member of NMSC Board of Directors

BARBARA SIDWAY Founding NMSC Board of Directors Chair

JANE JENKINS Downtown Oklahoma City, Inc.

FRED KENT Project for Public Spaces

BEPPIE LEGRAND Main Street South Carolina

ED MCMAHON Urban Land Institute

MANUEL T. OCHOA Enterprise Community Partners, Inc.

ANWAR SALEEM H Street Main Street

ASCALA T. SISK NeighborWorks America

PATRICE FREY National Main Street Center

This guide was made possible thanks to support from the John L. and James S. Knight Foundation, the Michigan Economic Development Corporation, and the National Trust for Historic Preservation.





For centuries, Main Streets have been the cultural, historic, economic, civic, and emotional hearts of our towns and cities. Forming at the center of a city or neighborhood, a community’s Main Street brings together a complex amalgam of uses, creating an economically self-sustaining ecosystem of retail and wholesale businesses, personal and professional services, government, entertainment, dining, industry, worship, lodging, and public assembly.

With the advent of shopping centers and regional shopping malls in the post-WWII era, then the advent of big box superstores several decades later, Main Streets lost their economic strength as a glut of commercial space flooded the marketplace, and residents moved further out from city centers and neighborhood districts.

But Main Streets don’t become great places again by accident. Revitalization almost always requires years of work, and maintaining the positive changes made is an ongoing responsibility. Just as shopping mall management companies don’t stop improving a mall’s tenant mix, maintaining the facility, or marketing the mall once it is initially leased up, managing a downtown or neighborhood commercial district involves ongoing and strategic effort to constantly adapt to changes in the marketplace.

What follows is a resource guide to creating or enhancing a sustainable commercial district revitalization effort using the Main Street Approach®, with resources and guidance for new and seasoned Main Street programs alike. The guide begins with the fundamentals of the Main Street Approach, then takes an in-depth look at Transformation Strategies—the centerpiece of a Main Street program’s work—and how Main Street programs can better align their work around district-specific strategies. From there, the guide will provide direction on how to best structure your program to meet your needs, how to measure progress, and outline some common keys to long-term success.

In recent decades, many downtowns and neighborhood commercial corridors have gradually regained economic ground, and new and old generations alike now actively seek out the unique spaces, economic vibrancy, and cultural interaction that older and traditional commercial districts offer.

THE MAIN STREET APPROACH

THE MAIN STREET PROJECT AND THE NATIONAL MAIN STREET CENTER

CREDIT: ED MCMAHON

In 1977, the National Trust for Historic Preservation launched a three-year pilot project in three Midwestern communities to explore ways to stimulate economic development in older and historic downtowns and to leverage the value of Main Street's historic buildings. The National Trust for Historic Preservation, a nonprofit organization that works to save America's historic places, was alarmed that shopping malls and sprawl development were diverting retail sales from downtowns, resulting in a downward spiral of disinvestment as businesses failed, buildings fell into disrepair, and investment shifted to the suburbs.



The participants in the three-year pilot project found that the key to revitalizing an older downtown was to approach the district's problems and opportunities in a comprehensive manner, working simultaneously in four broad areas that the pilot project's staff called the "Four Points":

ECONOMIC VITALITY focuses on capital, incentives, and other economic and financial tools to assist new and existing businesses, catalyze property development, and create a supportive environment for the scores of entrepreneurs and innovators that drive local economies.

DESIGN supports a community's transformation by enhancing the physical and visual elements of downtown while capitalizing on the unique assets that set the commercial district apart.

PROMOTION positions the downtown or commercial district as the center of the community and hub of economic activity, while creating a positive image that showcases a community's unique characteristics.

ORGANIZATION involves creating a strong foundation for a sustainable revitalization effort, including cultivating partnerships, community involvement, and resources for the district.



In addition to the Four Points, a set of guiding principles helps provide direction and focus on developing strategy, choosing activities, and communicating the revitalization initiative's purpose:

/// **Asset-based:** Every Main Street district has assets on which it can begin building its revitalization initiative. Many Main Streets have distinctive historic buildings that create a strong visual identity for the district, for example, and many have at least a handful of successful businesses that can serve as springboards for adding new products, services, businesses, and activities to the district. Other assets might include concentrations of district workers or residents, proximity to a major attraction, access to a major highway, the availability of certain types of buildings, the presence of a college or university, or strong entrepreneurial traditions. And, every Main Street district's history is rooted to that of its community, offering a rich narrative for the district's continuing evolution.

/// **Comprehensive:** All the factors that affect a downtown's health are tightly interrelated. Consequently, its revitalization strategies must address challenges and opportunities comprehensively, with simultaneous activity in each of the Four Points described above.

/// **Incremental:** Successful, sustained revitalization begins with a series of small actions that taken together, can lead to catalytic change. As public confidence in the district grows and the revitalization initiative's participants hone their skills, the initiative is gradually able to tackle more complicated challenges.

/// **Implementation-focused:** Transforming the economy of an older commercial district takes time, and the enormity of the challenge can sometimes seem overwhelming. Breaking these transformations down into small, achievable activities makes the process manageable. And, by demonstrating frequent, visible progress, the revitalization initiative gradually builds and strengthens community support.

/// **Quality:** Historically, Main Streets were built with high-quality materials and design, reflecting community pride. The district's revitalization initiative should emphasize high quality in all aspects of its work—in building rehabilitation, new construction, urban design, marketing activities, storefront window displays and in-store displays, public signs, public

amenities, and much more. Poor quality reinforces negative public images of the district. "High quality" does not mean "high price"; it involves careful planning and execution.

/// **Changing attitudes:** After witnessing years of negative changes, many people have lost hope that their community's Main Street can become a healthy, vibrant place again. Some have never experienced a vibrant Main Street and have difficulty envisioning what it might be like. But as small, positive changes start taking place and as the revitalization initiative consistently meets its goals, public attitudes begin changing, too. In fact, of all the things needed to strengthen a Main Street district, perhaps the most important one is shifting public attitudes about the district from negative to positive.

/// **Partnerships:** Neither the public or private sector can single-handedly revitalize a commercial district. Both sectors have substantial investment in the district, both have vested interests in the district's long-term success—and both have specific skills and resources needed for its revitalization. Partnerships must also be inclusive, engaging the entire community in envisioning the district's future and benefiting from its success.

/// **Self-directed:** While there are some government and nonprofit resources that can support certain revitalization activities, no outside entity can—or will—revitalize your community's commercial district. Only local leadership, from both the public and private sectors, can save Main Street. Strong local leadership not only builds community confidence in the district and its revitalization, but it also helps attract outside interest, helping assure outside funders and assistance providers that their potential investments of time and money will be well spent.



CREDIT: CHRIS ADVAL

As a result of the pilot project, the National Trust for Historic Preservation created the National Main Street Center in 1980 to make the Main Street Approach available to communities throughout the nation. Since that time, more than 2,000 towns and cities of all sizes—from small towns like Bonaparte, Iowa, and Port Gibson, Mississippi, to urban neighborhoods like Boston’s Chinatown and San Diego’s North Park—have participated in the program. Together, this vast network of community-based revitalization programs used the Main Street Approach to transform their downtown economies, rally volunteers, and celebrate their historic character. With billions of dollars reinvested, and hundreds of thousands of buildings rehabbed, jobs created, and new business opened, it is no exaggeration to say that Main Street programs—with the Main Street Approach in hand—have played a critical role in the revival of America’s downtowns over the last several decades.

THE MAIN STREET REFRESH

When it was initially launched in 1980, the National Main Street Center recommended that communities participating in the Main Street program create a new, free-standing nonprofit organization, supported by both the public and private sectors, to oversee the local Main Street revitalization initiative. Furthermore each new organization should create four standing committees—one for each of the Four Points—to implement program activities. Over time, this structure became the norm (and, in many places, became a requirement for participation in some states’, counties’, or cities’ Main Street Coordinating Programs). There are variations—some programs are housed in local government, for example, and some are funded exclusively by the public or private sector. But virtually all local Main Street programs created four standing committees.

In 2015, the National Main Street Center (NMSC), in partnership with the Community Land Use + Economics (CLUE) Group, conducted an in-depth examination of how well the communities taking part in the Main Street program were doing in reaching their goals. The examination involved input from hundreds of revitalization practitioners in communities of all sizes and in all parts of the US.

Through this process, the NMSC and CLUE Group found that, while most local Main Street organizations were successful in building basic revitalization skills, in forming public/private partnerships for revitalization activity, and in mobilizing volunteers, many of them were struggling to reach more challenging benchmarks like developing upper-floor housing units, recruiting new businesses, and identifying and eliminating barriers that impede a district’s economic growth.

We also found that many organizations were spending a disproportionate amount of time on promotional events. In part, it appeared that organizations were doing so because promotional events had become an important source of their operating income. But, at the same time, the emphasis on promotion created the misperception that Main Street organizations were primarily concerned with promotion—not with economic development or historic preservation, both of which are bedrocks of the Main Street program. And we found that, in many communities, the four standing committees were developing work plans independently from those of the other committees. While the activities the committees chose were generally positive activities, they were not necessarily focused or aligned on the same goals.

MAIN STREET REFRESH MAJOR FINDINGS

The Main Street Approach works best when it’s seen as a framework guiding revitalization work—not a prescriptive structure.

To be most effective, revitalization programs need to prioritize strategy and outcomes over process.

Organizational flexibility can be an asset, allowing for nimble shifts in strategy and a more tactical focus on economic development related activities.

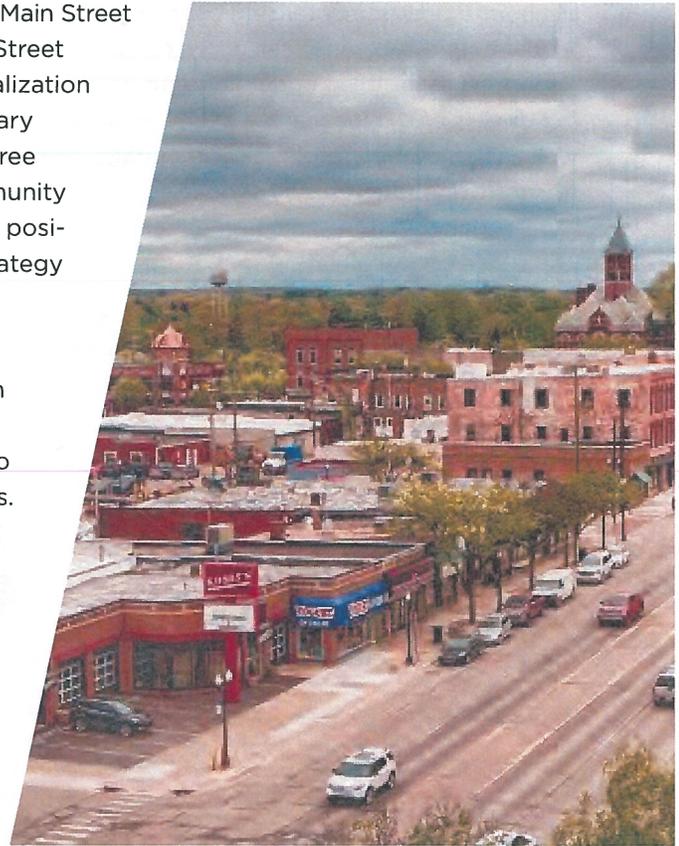
Inclusive community engagement is a fundamental building block to a successful revitalization effort. Main Street-style revitalization looks different in every community and district, and is a reflection of the input, wisdom, and perspective of local leaders, business owners, and residents.

As a result of its findings, the National Main Street Center made three key changes in the Main Street Approach:

1. Emphasis on Transformation Strategies: In the past, the National Main Street Center and most statewide, county, regional, and citywide Main Street America Coordinating Programs recommended organizing revitalization work according to the Four Points. This is still the case, but primary emphasis has now shifted towards the development of one to three Transformation Strategies—generated through meaningful community engagement and informed by an analysis of the district’s market position—that will guide revitalization work. Each Transformation Strategy is implemented through activities in the four broad areas of work represented by the Four Points.

2. Flexible organizational framework: Previously, the National Main Street Center and most Coordinating Programs encouraged or required communities participating in the Main Street program to create four standing committees corresponding to the Four Points. With the Refresh, participating communities can organize their revitalization work in many different ways, which can include continuing with the four standing committee structure. However, newly organized programs or programs that already use four standing committees may modify their organizational structure, depending on their needs, the availability of partner organizations, or other factors. Depending on local context and needs, this could lead to a more staff driven approach, or a work structure formed around project teams, external partnerships, or ad-hoc task forces.

3. Periodic re-examination: While periodic evaluation of program progress has always been an important part of the Main Street Approach, it is now an integral and essential tool for measuring the progress of the revitalization initiative’s Transformation Strategies and for fine-tuning its strategies to build on successes and pursue new challenges. This emphasis on periodic re-examination reinforces the Main Street program’s commitment to demonstrating impact. Revitalization organizations operate in an environment in which public resources are scarce and competition for private resources is fierce. Programs must be able to demonstrate the wise use of resources, which translates to real results on the ground.



CREDIT: RICHARD LIM PHOTOGRAPHY



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TRANSFORMATION STRATEGIES

A **Transformation Strategy** articulates a focused, deliberate path to revitalizing or strengthening a downtown or commercial district's economy. Grounded by both an understanding of the underlying drivers of the local and regional economy, as well as community feedback and engagement, a Transformation Strategy should describe a market position that the commercial district can successfully fulfill.

An effective Transformation Strategy serves a particular customer segment, responds to an underserved market demand, or creates a differentiated destination.

Simply stated, a **Transformation Strategy** is a comprehensive strategy that guides the direction of the revitalization initiative and, over time, transforms the district. Each Transformation Strategy has several important characteristics:

- /// It is rooted in the community's vision for the district.
- /// It is based on a solid analysis and understanding of the district's economy and its best economic opportunities.
- /// It is comprehensive, in that it is implemented through a broad range of activities that span the four broad areas of work represented by the Four Points.
- /// It is measurable, making it possible to track progress.
- /// It provides guidance for program activities for a two- to five-year period, after which the revitalization program should examine progress and make adjustments, as needed.

In general, a revitalization organization should work with one or two Transformation Strategies at a time. In some exceptional circumstances, it might consider tackling three Transformation Strategies—but more than three would be challenging.

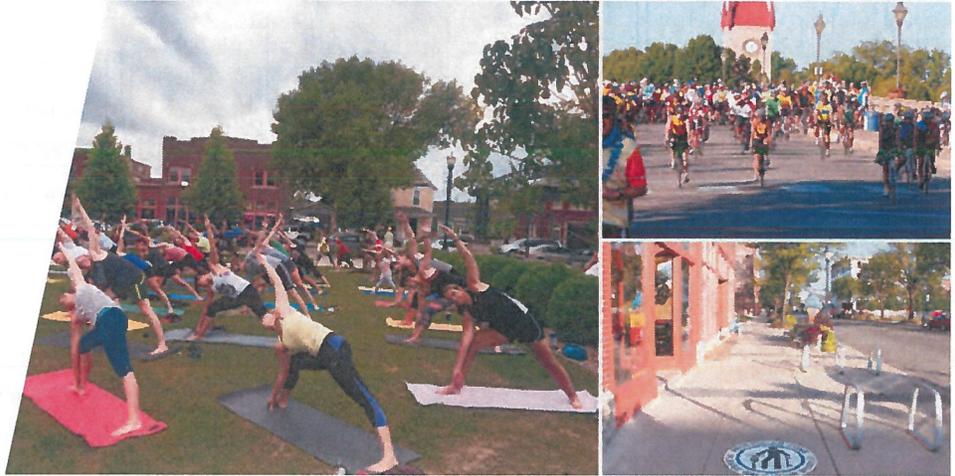


WHAT ARE “CATALYST STRATEGIES”?

A Catalyst Strategy is an off-the-shelf Transformation Strategy. It defines an economic focus or niche, describes the customers or types of businesses that are necessary to support it, and suggests initial projects for getting started. The Catalyst Strategy paints a narrative of what a district might look like if it succeeds in building a focused economy. To support the roll-out of the new Main Street model, the NMSC has developed a set of Catalyst Strategies that communities may choose to use as a starting point. You are not limited to the Catalyst Strategies; it is very possible that you will need to define a customized Transformation Strategy for your district.

The Catalyst Strategies may at first sound somewhat generic—and they are. They're designed to be adaptable to a variety of places and circumstances and then can be refined and customized over time, as you gain deeper understanding of your local and regional market and as you assess your success in achieving your goals. A Catalyst Strategy is a place to start, and the Four Points provide a framework for putting the strategies into action. Using one or more of the Catalyst Strategies can save you time, whether you are just getting started in your revitalization work or you are seeking to bring more structure and economic focus to your current work.

The ready-made Catalyst Strategies fall into two broad types: those that are focused on a specific customer segment and those that are focused on an industry, product, or service segment. Some of the Catalyst Strategies available for you to adopt or customize include:



CUSTOMER-BASED STRATEGIES

- Workers and Residents
- Elder-Friendly and Aging-In-Place
- Family-Friendly and Family-Serving
- Millennials, Hipsters and Young Adults

INDUSTRY, PRODUCT, OR SERVICE-BASED STRATEGIES

- | | | |
|--------------------------------|--|--|
| Tourists and Tourism | Entertainment and Nightlife | Furnishings |
| Agricultural Center | Environmentally-Friendly Products and Services | Health and Wellness |
| Apparel | Ethnic Specialties | Knowledge Economy |
| Arts (performing and visual) | Food | Manufacturing |
| College Town | Furniture and Home | Military Installations |
| Convenience Goods and Services | | Sporting, Recreation, and the Outdoors |

Even though they are ready-to-use, the same Catalyst Strategy won't look the same in any two places. An "Arts" strategy may reflect traditional fine arts in one place and graffiti art in another. Or an "Ethnic Specialties" district may reflect Latino businesses and culture in one place and African American businesses and culture in another.

HOW DO WE SELECT A STRATEGY?

We recommend starting with one or two Catalyst Strategies and refining them as your work progresses. But how do you choose among the options? Most of the strategies build on a local strength or opportunity, such as a cluster of businesses in a particular sector, an important local or visitor demographic, or a key business or institution. Even a single business that is well-known and functions as a destination can provide an anchor around which you can build a strategy.

You may be faced with challenges like:

- /// A concerning number of empty storefronts or a significant empty institutional building
- /// Competition from chains, big-box stores, and online retailers
- /// Shopper complaints like, "There's no place to buy socks downtown."

These challenges in themselves are usually not the basis for a strategy. They are too narrow and tailored around weaknesses in the market. Rather, a successful strategy builds on an inherent strength or characteristic that can be nurtured and grown. Some Catalyst Strategies simply may not fit your circumstances (if you don't have a college or military installation nearby, then the College Town and Military Installation strategies are not for you). Others you may decide are not a good fit for other reasons. It's best not to use the available Catalyst Strategies as a "wish list."



CREDIT: MICHIGAN MAIN STREET

Selecting a strategy is a process that includes intuition, quantitative analysis, and public engagement. Here is a practical approach to tackling these aspects and settling on the strategy or strategies that best fit your circumstances.

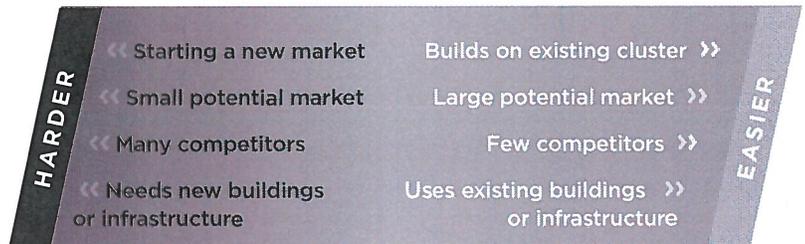
Ask each person to answer the following qualitative questions—based on what he or she already knows—to help assess the fit and feasibility of the strategies you are considering. For each strategy you are considering, answer the questions by making a mark along the arrow scale. The purpose of this exercise is to “take the temperature” of the fit, rather than to definitively adopt (or eliminate) any one Catalyst Strategy. Once everyone on your leadership team has done this initial screening independently, bring everyone together to discuss the results.

1. Conduct outreach. At an early stage, the Main Street program needs to engage key downtown stakeholders as well as the broader community. While community engagement can be hard work, it is a fundamental first step in securing buy-in from community members, and will result in a set of strategies that truly reflect the vision of the community.

At the most basic level, community engagement around Transformation Strategies assesses basic attitudes about the downtown or neighborhood district. Consider your Main Street-district stakeholders. Depending on your community, it will likely include local leaders, business owners, students, visitors, new residents, long-term residents, and more. You will want to find out what attracts them to the district; what’s missing from the mix; and who are the competitors. Try and get a sense for what kind of Main Street they’d like to see, and how they think the community should get there. Use the information gathered to provide further insight into your district’s strengths, weaknesses, and market opportunities. See the accompanying resource guide, *Community Engagement for Main Street Transformation* for more resources on this subject.

2. Initial screening. We assume you know your downtown or commercial district very well—you know the businesses and you have an intuitive sense of who comes there. You may already have an idea of what the market-driven strategy should be. We suggest you and your leadership team look through the list of Catalyst Strategies independently. Have each person make a list of three to five strategies that appear, at a glance, to be possibilities.

TEMPERATURE SCALES: WHAT STRATEGIES ARE A GOOD FIT?



The “temperature scales” should help bring some focus to your discussions and sorting of potential Catalyst Strategies. Do your ratings help you to eliminate any of the strategies? Do any strategies rise to the top? Has your list of possible strategies grown longer? Are there strategies you believe you need further information to be able to assess?

Note that even if some of your answers fall on the left side of the scale, that alone may not take it off the table. But it may mean that you will have to work harder to overcome significant barriers. For the Catalyst Strategies still under consideration, start to make lists of things you want to investigate further.

3. Light market analysis. Without getting bogged down in a full market analysis, examining some relevant data

is important and relatively easy to do. You can use market data to reassess your list of potential strategies and the winnowing process will often become clearer. As with the qualitative screening questions (above), demographic and spending reports provide additional layers of information to help you further evaluate your potential strategies. And, like the screening questions, the market data typically provides context rather than binary “yes/no” answers. See the sidebar **Where To Go For Information**.

4. Business inventory assessment. Next, look at your current business mix to see if you have economic clusters or strengths (or unrealized opportunities) that support one of more of the strategies you are considering. You may have a business inventory already, or you can go out and collect one. For larger districts, you can purchase a list of current businesses from data providers like *infoUSA* (which can be accessed at salesgenie.com). A purchased list will capture all businesses (not just those visible on the ground floors), but should be checked for accuracy by observation on the street.

5. Confirm your selected strategies. Your selected strategies should align with your best market opportunities, but they also need to align with your community’s aspirations. It is generally not practical (or even desirable) to hold a public referendum on your Transformation Strategies, but you should create opportunities to solicit public input to confirm the strategies. To do this, consider using one or more of the following tools:

Community meetings. Hold a public meeting to present the Transformation Strategies, or ask to be included on the agendas of other community groups (such as civic associations, public service organizations, churches, etc.) where you can present the strategies under consideration.

Online surveys. Circulate a survey with a list of strategies under consideration, along with a short description of each. Ask respondents to rate on a scale of one to five how closely each strategy meets the respondent’s vision for the commercial district.

Web and social media. Post the strategies to your organization’s Facebook page and your website, with a link to a survey.

Focus groups. Hold several focus groups to solicit feedback on the draft strategies.

The idea is not to take a “vote,” but rather to determine how your community sees itself and the future of

WHERE TO GO FOR INFORMATION

Sources for demographic and consumer segmentation information include the Census of Population and the American Community Survey (both at census.gov), ESRI, and several other sources.

You will need to define your assumed trade area. (This can be changed or refined in the future.) Trade area could be your zip code, city, or county. Or it could be the area within a certain radius or drive time.

Look for demographic benchmarks and trends and look for key areas of sales capture and leakage. Note that, with the exception of the Census, the data in these reports are generally estimates. Reports for very small geographies are less reliable than larger geographies, as they tend to magnify errors in the data.

With some basic data in hand, you can begin to answer questions like the following—and understand how the data support (or do not support) the Transformation Strategies you are considering:

What is the median age? What does it say about the life stage of households in your area? How does it align with the customer profile for your potential strategies?

What is the median household income? How does it align with your potential strategies?

What is the racial and ethnic mix? How is it changing?

What are the educational attainment rates?

What is the average household size? Does this align with your potential strategies? How might it affect the potential for residential development or the type of residential product offered?

What are the demographic trends? Is the population expected grow or shrink? Is the population aging or are younger households moving in?



CREDIT: MICHIGAN MAIN STREET

its commercial district, and see if it can align with the strategies that make the most economic sense. There may be cases where the strategies that make sense economically do not initially fit the public’s vision. In these cases, you may have to tweak the strategy, or you may want to undertake further outreach and engagement efforts to ensure that all stakeholders understand why the proposed direction will lead to the best foreseeable outcomes.

There are many benefits to aligning your Transformation Strategies with the boarder community and stakeholders. Even for those members of the community not totally convinced by the selections, having the opportunity to participate will increase the likelihood that they will be supportive in the long-run.

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WHAT AREA SHOULD YOU USE FOR MARKET DATA?

You will probably want to look at several geographic areas to see differences in market data. The size of the area will depend on whether your commercial district or downtown is in an urban, suburban, or rural environment. For most places, it makes sense to look at demographic and economic data for the city as a whole first. (For urban neighborhoods, start with the neighborhood boundaries.) You may also choose to look at demographic and economic data for additional trade areas that you can define, such as radii or drive-time areas from a central intersection.

- ▶ In addition to varying by urban or rural context, trade areas are also influenced by physical boundaries and barriers, such as rivers, mountains, and highways.
 - ▶ Note that trade areas vary by Transformation Strategy: A strategy focused on *Downtown Workers* has a much smaller trade area than a *Home Furnishings* strategy.
 - ▶ Strategies focused on tourism are usually not well-suited to analysis of nearby geographic areas, unless the tourist draw relates to a regional market. Instead, you may want to gather information about visitors by interviewing related businesses, surveying and interviewing visitors themselves, or reviewing any collected market data from the local/ regional tourist bureaus.
-

HOW MANY STRATEGIES? AND ARE THEY PERMANENT?

For most commercial districts—whether a downtown, central business district, or a neighborhood business district—you should plan to choose one or two Transformation Strategies. The strategies you choose should be compatible with each other (so they can coexist in the same area at the same time). In some cases they may be complementary (e.g., a daytime strategy paired with an evening strategy). Choosing more than two strategies makes it harder to maintain a rigorous focus on a deliberate direction.

There may occasionally be cases where it makes sense to pursue more than two Transformation Strategies. For example, a larger downtown might have several specialized districts. Or a very long, linear commercial street might have several distinct nodes, each with a different physical format (e.g., pedestrian versus auto-oriented) or a different market. In these cases, each neighborhood or sub-district might warrant its own strategy.

If you select more than one Transformation Strategy, you should also take stock of whether you have the capacity (within your own organization and your partners) to advance the strategies effectively.

The strategies you select are not permanent. Think of them as two-to-five year plans. The nature of retail and

entertainment continues to shift, and commercial districts evolve as consumer preferences and needs evolve. Ten years from now, some strategies may have become long-term trends and others passing fads. This further suggests the need for metrics that allow for both qualitative and quantitative analysis of the strategies to demonstrate after each year that you are truly moving the needle on the revitalization process.

CUSTOMIZING THE STRATEGIES

The Catalyst Strategies are designed to be adaptable to different markets. Each Catalyst Strategy can be targeted toward a price or style segment. For example, the “Home Furniture and Home Furnishings” strategy could take any of several forms: used-merchandise stores (e.g., Goodwill); more trendy vintage and consignment stores; new, mid-priced furniture and housewares; or high-end designer furniture and furnishings. Similarly, “Entertainment and Nightlife” could range from local taverns to special-occasion restaurants.

The Catalyst Strategies can be customized around a population segment. For example, *Ethnic Specialties* could be adapted to a district with virtually any ethnic identity—from the Chinatown district in downtown Boston, to the Arab American-focused East Downtown Dearborn business district in Michigan, to Leimert Park’s African American Cultural Village in Los Angeles.

A word of warning about a couple Catalyst Strategies.

You may also notice that two of the Catalyst Strategies are similar: “Convenience Goods and Services” and “District Workers and Residents.” Both of these strategies are geared toward people in or near your commercial district who make convenience-related purchases. (The former describes product-based strategy; the latter describes a customer-based strategy.) These are the most popular Catalyst Strategies because many communities desire a locally-serving business district. However, these strategies can also present challenges because they are price-competitive and they are not differentiated.

For example, with pharmacy purchases, a customer is likely to go to a chain drug store—and the customer is likely to go to the chain drug store nearest to where she lives or works. She is not likely to travel to a less convenient drug store to make a routine purchase. Along with this lack of differentiation, traditional independent retailers may not be able to compete on pricing with

chain or online retailers. For these reasons, we encourage you to consider all of the available Catalyst Strategies—and any customized strategies that may fit your particular circumstances—before settling on either of the convenience-oriented strategies. A differentiated strategy that attracts people from beyond your immediate area may be more effective.

VISION, MISSION, GOALS, TACTICS... AND TRANSFORMATION STRATEGIES?

Once established, Transformation Strategies become an integral component of your organization’s overall structure and strategic orientation. Together with your mission, vision, goals, and tactics, they provide a framework for communicating your downtown’s competitive positioning, aligning and leveraging partner activities, prioritizing your work, and maximizing your organization’s financial and human resources and capacity.

These terms can be a bit confusing, and they are sometimes inadvertently used interchangeably. But each has a distinct purpose:

The organization’s **vision** describes how the community envisions the district will look, feel, and function at some point in the future when the district has reached its full potential and has achieved the transformations the community desires. An organization’s vision is usually translated into a vision statement that can help establish its principles and set long-term direction.

A **mission statement** explains why the revitalization initiative exists. It puts the vision statement into more concrete terms—what the program will do, and why it’s going to do it. Fundamentally, all revitalization programs exist to improve the economic health and cultural vibrancy of their commercial districts for the benefit of the community, with an emphasis on doing so by preserving and celebrating the district’s historic assets. That’s the mission.

Goals help to focus a program on the outcome it hopes to achieve by fulfilling its mission. Goals refer to specific, measurable results, and generally are tied to a timeline. For example, a revitalization program might have a goal of increasing the district’s overall occupancy rate to 95 percent in five years, or a goal of doubling the number of retail businesses that cater to families with young children by 2025.

Tactics describe the specific actions the organization will take to reach each of its goals. For example, if

one of the revitalization initiative's goals is to increase the availability of downtown housing by 25 percent, tactics might include gathering information about the district's upper-floor spaces, gaining support from property owners, eliminating red tape that might deter property owners from converting unused or under-used space to apartments, and/or creating some financial incentives to encourage property owners to convert space to apartments.

Most revitalization organizations have developed vision statements, mission statements, goals, and tactics. What is missing is the link between how organizations get from their mission and vision statement to achieving goals—and that's where Transformation Strategies come in. **Transformation Strategies provide clear guidance for how communities will fulfill their vision, advance their mission, strategically focus their tactics, and achieve their goals.** Ultimately, Transformation Strategies help ensure that activities in each of the Four Points are focused on the same outcomes.

HOW TO ALIGN YOUR WORK AROUND TRANSFORMATION STRATEGIES

Aligning a program's capacity and resources around selected Transformation Strategies is a critical component in ensuring long-term commitment from stakeholders, and ultimately, in achieving success. Here is a suggested process for ensuring buy-in at the leadership level and for gaining tactical alignment at the implementation level:

Step 1: Hold a dedicated board meeting to go over the proposed Transformation Strategies and vote on one to two that will guide your work. This is critical for a number of reasons. The board is ultimately responsible for setting the budget, as well as for approving the organization's annual work plan. Without support for the Transformation Strategies, it makes it far too easy for leadership and volunteers to get distracted by projects or activities that may be interesting, but are off-strategy.

Revitalization organizations do not have unlimited resources and capacity, and there will be difficult moments during the work planning process in which decisions will need to be made to discontinue certain activities. Strong, committed, laser-focused leadership is required by the board to establish and maintain focus on the Transformation Strategies.

Step 2: Hold a larger meeting of all the committees (if you have them), staff, or work groups prior to work planning to review the selected Transformation Strategies and collectively discuss how each group or individual views itself as contributing to its implementation. It is important to remind people that:

- /// This is a transition, and it is not anticipated that you are to abandon everything you've been doing in pursuit of Transformation Strategies. Fully aligning your work plan around strategies is likely to take some time.
- /// It is important for your organization to cultivate and advance opportunities that support its Transformation Strategy. However, there will undoubtedly be opportunities that do not directly align with your effort, but are still have merit. For example, if you have selected an "Arts and Entertainment" Transformation Strategy and a great bridal boutique is interested in setting up shop, there is no reason to dissuade them from opening downtown. They can still contribute to the overall revitalization process.

Step 3: As you facilitate the work planning process, remember that you should develop activities that advance the selected Transformation Strategies and fall under each of the Four Points. Here are some key questions to consider:

- /// What current activities are you undertaking within the Four Points that already align well with the Transformation Strategies?
- /// What other groups/organizations are conducting activities/programming that might align with the Transformation Strategies?
- /// What activities are both underperforming and are off-strategy that can be discontinued?
- /// Are there new priority activities that should be added within each of the Four Points that help to further advance the Transformation Strategies?

Step 4: After these questions have been addressed, committees and/or project teams can meet separately and begin to outline the more tactical elements of the strategy, including staffing, budget needs, timelines, and how to measure its success.

An example of a Transformation Strategy-aligned work plan:

An example of a Transformation Strategy-aligned work plan

BRUSH! TRANSFORMATION STRATEGY: AGRICULTURAL ECONOMY

In agricultural communities, an “Agricultural Economy” strategy focuses on better meeting residents’ shopping, service, and entertainment needs and on finding new uses for vacant downtown buildings.

ECONOMIC VITALITY

Current activities:

1. Marketing seminars for businesses (not ag-specific)

Potential activities:

1. Add/recruit: work apparel; farm-to-table restaurant; local/organic soaps, etc.
2. Partner w/ extension service to do ag-related business seminars
3. Attract vendors from Octoberfest
4. Homegrown Brush store
5. Incentive to move businesses downtown
6. Crowdfund a building purchase
7. Pop-up w Brush/local product in Main Street storefront?

DESIGN

Current activities:

1. Storefront incentives
2. Clean-up (April)
3. Downtown flowerpots

Potential activities:

1. Walking tour: tie to Ag
2. Public art “hoof-prints” to mark walking tour
3. Display historic photos of downtown bldgs in storefronts
4. Display ag-related artifacts from museum in storefront windows
5. Streetscape incorporating ag images
6. Public art: Mural? Sculpture? (Ag images)
7. Community garden

PROMOTION

Current activities:

1. Antique Tractor Show
2. Ag Appreciation Dinner
3. Cust. Appreciation BBQ
4. Pickers Market
5. Bull Riding event
6. Brush Rodeo
7. Octoberfest

Potential activities:

1. Farm to Table dinner on-street, in downtown
2. Farmers Market
3. Christmas/Holiday promo (tie to ag)
4. Sugarbeet bowling contest

ORGANIZATION

Current activities:

1. FFA at Ag Appreciation Dinner
2. Library partnerships
3. Stakeholders: Morgan Community College, Hospital

Potential activities and needs:

1. Junior Main Street
2. Connect to Cattleman's Association
3. Livestock Exchange

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TIPS ON WORK PLANNING

Let’s assume that, based on market research and community input, a revitalization organization chooses two Transformation Strategies to guide its work over the next five years, and that one of these Transformation Strategies is to make the Main Street district a vibrant arts and entertainment district. To do so, some elements of a work plan might include:

- /// Attracting artists to live and work in the district
- /// Rehabilitating a historic theatre and reactivating it for live performances, film exhibition, and public assembly
- /// Enlivening public spaces throughout the district
- /// Expanding the number and variety of restaurants in the district

Note that each of these activities should align with the Four Points. For example, the first activity—attracting artists to live and work in the district—might involve work such as:

- // Developing ongoing partnerships with local and regional arts organizations
- // Identifying spaces that might work well for studio and art exhibition space
- // Consistently promoting the district’s position as a regional arts and entertainment center in order to change public perceptions of the district
- // Involving artists in urban planning activities
- // Developing, promoting, and managing incentive programs to encourage property owners to create studio and live/work spaces for artists
- // Bringing arts and entertainment into public spaces
- // Marketing the district’s arts and entertainment offerings to the public—and, specifically, to the target markets identified through the revitalization organization’s market research

Some of these activities might fall squarely within one purview of the Four Points. But many of them are likely to include work that straddle two or more points. For instance, achieving the objective of bringing arts and entertainment into public spaces might involve such activities as:

- // Creating a wayfinding system for the district that reflects the district’s emphasis on arts and entertainment [an activity that falls into the Design category]
- // Retooling the current promotional calendar by creating some new arts-focused events, removing events that do not specifically reinforce this Transformation Strategy, and shifting marketing emphasis towards the target markets identified in the revitalization program’s market research [Promotion]
- // Providing storefront window display space for area artists [Design, Promotion, and Organization]
- // Obtaining municipal approval for sidewalk dining and vending [Design, Organization]
- // Working with business owners to create outdoor dining and vending opportunities [Economic Vitality]

In this way, the Transformation Strategies help ensure that changes are comprehensive—and that the entire organization, and its partners, are focused on a unified agenda for the district’s revitalization.

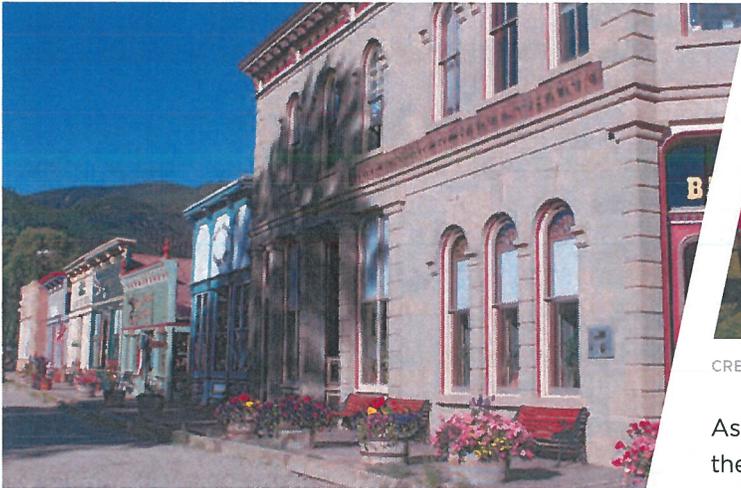
ORGANIZING AROUND TRANSFORMATION STRATEGIES

Since its inception, the National Main Street Center and most Main Street America Coordinating Programs encouraged or required communities participating in the Main Street program to create four standing committees corresponding to the Four Points. With the refresh of the Main Street Approach, the National Main Street Center encourages participating communities to organize their revitalization work in the way that best fits the needs of the community.

IF YOUR DISTRICT IS ALREADY USING THE MAIN STREET APPROACH

When implementing the refreshed Main Street Approach, existing Main Street programs will need to make an essential decision about how to structure their work. If your community currently has four standing committees—one for each of the Four Points—and this is working well for your organization, there is no need to change the structure. Instead, you might simply begin organizing the agendas for your program’s board meetings around the Transformation Strategies so that the strategies become the central organizing elements of each meeting. If, however, you find that having four standing committees is not working particularly well, this is the time to make adjustments.

Some programs may find that the standard four committee model results in a “silo” effect, in which each of the four committees develops its own work plans and implements projects independently of one another. The individual committees may all be working on worthy projects, and be highly effective in their own right, but if they are not used to working collaboratively it will be very difficult to advance Transformation Strategies.



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The questions below can help you and your stakeholders decide whether it may be appropriate to retain your committees, or whether a new organizational structure is needed.

- // Is the work load between the committees well balanced?
- // Is each committee meeting its objectives?
- // Are there any skills or areas of expertise that would help the organization implement its Transformation Strategies but that are not currently present within the committees?
- // Are there any organizations or agencies in the community or region whose goals overlap with those of the revitalization program and/or that have skills or expertise that could help the revitalization program with its Transformation Strategies?
- // Would partnering with another organization on one or more areas of work boost the revitalization organization's effectiveness in meeting its goals?

What might this look like in practice? Lake City DIRT (Downtown Improvement and Revitalization Team) operates in a small Colorado mountain town. They struggled maintaining four committees and ultimately found that having project task forces improved volunteer participation. Monthly committee meetings were wearing down volunteers, but organizing around Transformation Strategies and the refreshed Main Street Approach has brought more partners, more interest, and has inspired the community.

As outlined earlier, the board took the lead on identifying their Transformation Strategies, including an arts-focused strategy. Lake City DIRT held a public meeting where partners including the town, county, local arts center, and chamber of commerce, as well as community volunteers, identified their roles and project interests.

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 Several ideas for initiatives that advance the arts strategy, and align with the Four Points, have been adopted and/or are being considered for the future, including:

- ▶ **Programming at the local art center in the summer [Promotion and Economic Vitality]**
- ▶ **Installing public art [Design and Organization]**
- ▶ **Walking tours of art studios [Promotion and Economic Vitality]**
- ▶ **Art booths at the Wine Festival [Organization and Promotion]**
- ▶ **"Made in Lake City" [Promotion and Economic Vitality]**
- ▶ **Everybody's an Artist, a maker space for artists of all genres [Economic Vitality]**

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 The Main Street program leads a number of these initiatives, but the chamber, local arts groups, town, and county also share responsibilities. They brainstorm together and jointly assume projects, ensuring that all Four Points are covered, and that their collective work is driving towards the Transformation Strategy. Once work plans have been developed, the partners seek volunteers to work on individual projects. Lake City DIRT has found that this is a much easier way to engage volunteers who are not required to attend monthly meetings but can focus on the projects that are of most interest to them.

This approach to organizing a Main Street effort can streamline workflow and make it easier to engage volunteers, but maintaining open lines of communication is key. Email works in Lake City, but other communities use online programs like BaseCamp, Slack and Google. These programs allow for multiple people to update project statuses and are available for anyone to check for updates as projects progress.

IF YOU ARE NEW TO THE MAIN STREET PROGRAM

A key element of any effort to revitalize downtown involves choosing a way to organize and effectively implement and manage Transformation Strategies, and the organizations' revitalization initiative more generally. In some instances, an existing organization or agency might launch the revitalization initiative. Or an existing entity might assume the lead role in a revitalization agenda supported by a coalition of organizations and agencies, with each entity tasked with specific portions of the revitalization agenda, according to its expertise. In other instances, it might be better to create a new organization, giving the revitalization initiative a clean slate, free of negative perceptions that some members of the community might have of existing organizations.

The following questions can help you explore whether to house the revitalization initiative within an existing organization or agency or whether to create a new organization:

- /// Is there an existing organization or agency whose mission is consistent with that of the Main Street program and that has the capacity to manage the revitalization initiative? If so, is that organization perceived positively by the public?
- /// Would having a new organization, with no previous agenda or supporters (or critics) help attract a broader coalition of participants? Or would the community feel reassured by the experience and track record of an existing organization or agency?

- /// Would an existing organization have or hire a staff person whose primary job is dedicated to the revitalization of the district?

For a list of some of the types of organizations using the Main Street Approach, see "What type of organization?" below.

WHAT TYPE OF ORGANIZATION?

Almost any type of organization can adopt and use the Main Street Approach to revitalize and manage a commercial district. Organizations using the Main Street Approach include:

Traditional Main Street organizations: Almost 2,000 cities and towns have created Main Street organizations over the past several decades. While their configuration has varied slightly from place to place, most share these characteristics:

- /// They receive programmatic and financial support from both the public and private sectors.
- /// They are managed by a board of directors that includes representation from a wide range of stakeholders (property owners, business owners, local government, etc.).
- /// They have paid, professional staff.
- /// They are usually nonprofits (designated as 501(c)3 organizations by the Internal Revenue Service), although some are housed in local government organizations (such as local planning/community development departments) and a few are housed in private-sector organizations (such as local historic preservation organizations, chambers of commerce, etc.).



CREDIT: MISSOURI MAIN STREET

Special assessment districts: Special assessment districts are created by property owners (or, in some cases, by business owners) who voluntarily agree to pay an annual assessment in order to fund certain district revitalization or management activities. Most states have legislation enabling the creation of special assessment districts, although the names used for the special assessment districts vary from state to state (business improvement districts, self-supporting municipal improvement districts, business improvement areas, community improvement districts, and special service areas, to name a few).

There are scores of local Main Street programs that use the organizational structure of a traditional Main Street organization and that fund part or all of their activities with revenue from a special assessment district. And, there are some traditional special assessment district associations that use the Main Street Approach to organize their work.

Community development corporations: Community development corporations (CDCs) typically focus on developing affordable housing, particularly in economically distressed or underserved neighborhoods. But a growing number of CDCs also help develop and strengthen businesses. Having a strong commercial district helps provide jobs and essential services to neighborhood residents.

The boards of directors and staff of CDCs usually have significant experience with real estate development and finance, particularly with regard to housing development. Their property development skills can be invaluable in financing the rehabilitation of older and historic buildings and construction of new, infill mixed-use buildings, including using federal and state tax credits.

Redevelopment agencies: Redevelopment agencies are responsible for reversing blight and decay in areas designated by local government. Once established, a redevelopment agency undertakes a variety of projects to improve the area, such as upgrading infrastructure, preserving historic buildings, and stimulating business and property development.

The activities redevelopment agencies can do, and the tools they can use to do them, are determined by state

legislation. In most places, redevelopment agencies generate money for their improvement activities through Tax Increment Financing¹. Most also receive direct allocations from their municipal government, and some earn administrative fees and receive other types of funding. Some have the ability to exercise eminent domain.

Downtown development authorities: A few states have enacted legislation that permits towns and cities to create downtown development authorities. In essence, these function like redevelopment agencies, but with a specific focus on downtown development.

City hall: Scores of downtown revitalization programs, including many Main Street programs, are housed in city government offices—usually in city planning offices, departments of community development, or as freestanding city agencies or departments.

Chambers of commerce: Chambers of commerce provide a variety of services to their member businesses, help promote the community, and encourage new business growth and development.

Historic preservation organizations: A few of the most successful Main Street programs in the US were launched by local historic preservation organizations.

A NOTE ON PARTNERSHIPS

Regardless of the type of organization leading the revitalization effort, it's essential to identify all the partner organizations who share in the vision for a more vibrant downtown or neighborhood district and can play a role in project implementation. Those partners may include: universities and colleges, local or statewide foundations, chambers of commerce, economic development entities, local civic organizations, neighborhood associations, business groups, and more. Once the board and staff have identified the Transformation Strategies, the next step is to bring key partners together to discuss how their work can or will help fulfill the strategies. Brainstorming new projects and adjusting existing projects in conjunction with partners will help the downtown or commercial district achieve revitalization goals more quickly. Work plans developed by each entity can be shared and quarterly meetings held where updates are provided.

¹ Tax Increment Financing is a tool for financing current public improvements in a designated district with future property tax revenues from the district. It might be easier to explain TIF an example: Let's say that there is an un-rehabilitated building in your district that currently has an assessed value of \$50,000, and the city's commercial property tax rate is one percent. The property owner, then, currently pays \$500 in property tax annually (\$50,000 x 1 percent). If the property owner rehabilitates the building and, after rehabilitation, it has an assessed value of \$250,000, the city would normally collect an additional \$2,000 in property tax (\$200,000 of new value x 1 percent). If the building is in a Tax Increment Financing district, though, the city could dedicate that new increment of property tax revenue for improvements within the district.

SECRET TO SUCCESS: A FULL TIME DIRECTOR

A downtown revitalization effort is best served by having a full-time position that is charged with focusing on Main Street-related work. While Main Street revitalization relies on the contributions of volunteers, an active and engaged board, and community-wide partnerships, the role of Executive Director or program manager is critical. This is challenging, time consuming (and of course, rewarding!) work. Having an individual who is dedicated full-time to the effort ensures that someone will be responsible for coordinating efforts among staff, partners, and volunteers. In larger cities and neighborhood commercial districts, programs will often rely more heavily on staff to implement projects, so additional support including marketing and PR staff, economic development professionals, and grant administrators are particularly helpful.

SOME NOTES ON THE EVOLUTION OF REVITALIZATION PROGRAMS

Successful revitalization programs generally go through three distinct phases of activity over time:

A catalyst phase, in which the revitalization program gets started. The revitalization program's early goals usually focus on initial challenges and on gathering information—and, since the program has no track record yet, on building fiscal and volunteer support to sustain the program in its initial years. During these years, the revitalization program learns basic revitalization skills, builds partnerships, and begins conducting market research and gathering community input in order to shape the program's long-term vision and to choose Transformation Strategies. The revitalization program is generally ready to move to its next phase when it has reached four benchmarks:

- /// Its leaders have developed a good understanding of the district's role within the regional economy.
- /// The initiative is generally perceived as credible and effective within the community.
- /// The program's participants are beginning to plan and act strategically, rather than dealing primarily with immediate needs and problems.
- /// The initiative's leaders have found a way to effectively guide and manage design changes within the district.

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If you participated in the Main Street Program before the Main Street Refresh in 2015-2016, you will also find that some of the jargon has changed a bit. For instance:

The Main Street Four-Point Approach is now simply called the Main Street Approach.

The Main Street Approach now refers not just to the Four Points but also to the process of choosing Transformation Strategies and measuring progress in achieving these transformations.

Economic Restructuring is now called Economic Vitality.

.....

A growth phase, in which the revitalization program puts the skills and tools it has developed to work on more complex challenges. During a program's growth phase, communities experience significant growth in economic gains with investment by the public and private sectors with a new-found confidence in the downtown/district. As the initiative reaches its next transition, the district typically has an overall occupancy rate of 90-95 percent and at least 80 percent of the buildings that needed physical improvements have been rehabilitated.

A management phase, in which the program maintains the positive changes that have taken place over an extended period of time and continually fine-tunes the program's activities to adapt to changes in the marketplace.

A revitalization program's organizational needs are likely to differ at different points in its evolution. For example, your program's participants might find that having a standing committee for each of the Four Points works well during its catalyst phase, but that it might be more effective to turn certain activities over to another organization during its growth phase in order to provide specialized assistance to businesses or property owners or to increase the volume of work it is able to do. You might find that the program needs different types of board members and other types of

volunteers—and potentially different types of staff—at different points in its evolution. For example, some volunteers excel at launching new initiatives and might make ideal leaders in the revitalization program’s catalyst phase, but they might not be as interested in or skilled at managing activities during the program’s growth phase.

WHO DOES WHAT?

Regardless of the type of organization using the Main Street Approach, or whether or your organization is new to Main Street or a long-time veteran of the program, the organization’s leadership must focus on both fiduciary and strategic responsibilities.

Its fiduciary responsibilities include:

- /// **Financial management:** This includes ongoing record keeping; conducting and publishing annual audits; filing local, state, and federal tax reports; managing endowed and special purpose funds; and all other aspects of the program’s fiscal health.
- /// **Resource development:** Raising money should never be the sole responsibility of the organization’s professional staff. The staff is responsible for executing the Transformation Strategies the organization’s leadership has chosen, but the program’s leaders are responsible for raising the resources needed to do so.
- /// **Personnel management:** This includes managing both staff and key volunteer positions.

Its strategic responsibilities include:

- /// **Strategy and work plan development:** Each Transformation Strategy could benefit from one or more people serving as a sort of conductor, ensuring that the organization makes steady progress in moving the Transformation Strategy forward and that the work of each committee and organizational partner reinforces that strategy.
- /// **Partnerships:** Much of the work needed to revitalize older and historic business districts can be done by or in partnership with existing organizations and agencies. For example, public space improvements might be implemented by a local department of public works, retail marketing might be coordinated with a merchants’ or business association, and

business development might be assisted by a regional economic or industrial development agency.

- /// **Expertise in the Four Points:** Each revitalization organization needs volunteers and partners with expertise in one of the four areas of work represented by the Four Points:



- /// **Economic Vitality:** The Economic Vitality team is responsible for improving the economic performance of the district. Its responsibilities include helping existing businesses better meet the needs of customers and expand their sales, developing and attracting new businesses, ensuring that adequate capital is available to support business and property development, and creating and managing tools and incentives to encourage and support business and property development. Economic Vitality team members might include people with expertise in business management, real estate development, finance, or economic development.

- /// **Design:** The Design team is responsible for implementing all the aspects of the Transformation Strategy that involve physical and visual components, including building rehabilitation, infill development, public spaces, signs, window displays, logos, transportation, and parking. Design team members might include people with expertise in architecture, landscape architecture, urban planning, product design, graphics, visual merchandising, historic preservation, and civil engineering, as well as people with a strong appreciation for an understanding of the physical characteristics that help make an older or historic commercial district work well.

Promotion: The Promotion team is responsible for marketing the district to area residents, district workers, visitors, investors, and others. Its responsibilities include planning and implementing three specific types of promotional programming:

- // Special events and festivals
- // Business and retail promotional activities
- // Image-building activities

Promotion team members might include people with expertise in marketing, advertising, event planning, website design, graphics, public relations, and retail management. Special events and festivals also simply need lots of volunteers to help staff and ensure smooth implementation. These events offer a great opportunity to involve school groups, civic organizations, social clubs, and other civic-minded organizations.

Organization: The Organization team is responsible for ensuring that the revitalization program has the financial resources, volunteers, and partnerships it needs to accomplish its mission and to successfully implement each Transformation Strategy. Organization team members might include people with expertise in business management, public and/or media relations, fundraising, organizational development, project management, or leadership.

Evaluation: The revitalization initiative should gather baseline data about the district's economic condition and about its cultural and historic assets, plus baseline information about how the public perceives the district. It should develop tangible, quantifiable targets for each of its Transformation Strategies and use these targets to periodically evaluate the revitalization initiative's progress.



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A FEW THOUGHTS ABOUT VOLUNTEERS

As you organize your Main Street program (or refine and refresh your program, if it's already up and running), give some consideration to the types of volunteers and partners you will need to carry out your work. In addition to thinking about the specific skills needed, also think about the individual strengths and personal preferences of your staff and volunteers and match them with the tasks the organization needs to do. A few things in particular to keep in mind:

Starters and sustainers: Some people are good at starting projects—but they lose interest before finishing them. Often, the people who launch Main Street programs bring lots of enthusiasm to the revitalization initiative, but they lose energy after several years and turn their attention to new challenges. This is perfectly normal. Fortunately, some people are better at managing and sustaining projects than at launching them. As your Main Street program approaches major transition points, be sure to engage new volunteers who can sustain and expand the revitalization initiative. And, keep the “starters” involved by assigning them to new projects.

Achievers and affiliators: Some people excel at working independently on tasks—and they may be frustrated working in groups. Other people, however, may sign up for a task specifically because they want to be with other people. Organizations that rely on volunteer efforts need both types of people, for different types of tasks.

Power brokers: Organizations also need people with the power to make certain things happen, like using their connections to raise money, pass an ordinance, or arrange for a high-profile speaker at an event. Many revitalization organizations invite these people to join their boards of directors. Unfortunately, many power brokers don't like to attend meetings. While they can provide the organization with resources and prestige, power brokers might not be the best people to manage the day-to-day and strategic responsibilities of the Main Street program. They might best serve in an advisory capacity or on specific projects with defined beginning and end points.

MEASURING PROGRESS

For several decades, most local organizations actively participating in the Main Street program have tracked certain types of changes in their districts on a monthly, quarterly, or annual basis. While the specific information gathered varies slightly from place to place, the basic data collected by most participating organizations includes:

- Building rehabilitation projects:** The numbers of buildings rehabilitated and the approximate cost of rehabilitation projects. This tally should include small improvement projects (e.g., new signs or awnings) as well as larger-scale building rehabilitation projects.
- New construction:** The number of new buildings built within the district and the approximate cost of construction.
- Public improvements projects:** The number, type, and approximate cost of public improvements projects, such as street and sidewalk improvements, utility upgrades, public parks, greenscaping, and signage.
- Business openings, closings, and expansions:** The net number of businesses that have opened, expanded, or closed, and the associated changes in net numbers of jobs created or lost within the district.
- Volunteer time:** The number of volunteer hours committed to the revitalization process.
- Housing units:** The number of new housing units created within the district, minus any that have been converted to non-housing uses.

These are all important characteristics to measure. In addition, there are other characteristics that can help measure the district's economic health. These include:

- Property valuation:** Changes in property valuation from year to year provide tangible evidence of the district's economic improvement. Local taxing authorities typically develop estimates of property value for the purpose of assessing property taxes—but these assessed values are not the same as the appraised value of a building, which estimates the market value of a building based on comparisons with the prices for which comparable buildings in the area have recently sold. In order to use apples-to-apples comparisons from year to year, use an online service that estimates current real estate market values.



- Use of various tools and incentives:** Financing tools help support building rehabilitation and new construction, as well as business development. Incentives offer some special enticement, such as grants, preferential loan terms, or deferred loan repayment, to encourage business and property development. Some of the financing tools and incentives that rehabilitation projects often use include federal and/or state historic rehabilitation tax credits, federal Community Development Block Grants, federal New Markets and sustainable energy tax credits, dedicated local loan programs, local property tax deferral or abatement, or one or more of many other types of financing tools and incentives. Tracking how often each of the available tools and incentives is used, and the volume of projects they support, will help your program understand which tools are most effective and most needed to help meet the program's goals.

- Rent levels:** Information about the rent levels that the district's commercial and residential property owners charge can usually be obtained from realtors and from the property owners themselves—and, of course, from the tenants. Be sure to also gather information about what services (if any) are included in the rent and about whether there are any important variables in the rent charged so that you are comparing apples to apples. For example, in a "triple net" lease (sometimes abbreviated "NNN", the tenant is responsible for paying for real estate taxes, property insurance, and property maintenance, in addition

to the base rent amount the landlord charges. In “percentage” leases, a property owner charges a base rent amount plus a percentage of the commercial tenant’s gross sales.

Occupancy levels and building use: Local government can provide information about the tenancy of buildings within the district, but this information is sometimes incomplete and should be verified by an annual door-to-door survey. Use the North American Industry Classification System two-digit codes to classify business entities (including government and nonprofit entities). For non-business entities, such as housing units and vacant spaces, simply note the number of units.

Retail sales: Changes in retail sales levels from year to year are usually a very good indicator of the district’s changing economic condition—but, for a variety of reasons, it is very difficult to obtain accurate information about retail sales for commercial districts. A local government typically collects retail sales taxes from businesses within its jurisdictions on behalf of the state government, but it has no motivation to divide sales by district or shopping center. Even in instances in which a local government could, theoretically, extract information on retail sales taxes collected from a particular district, doing so could risk the confidentiality of data from businesses in store categories with only one or two stores. Some states do not charge retail sales taxes at all, in which case no data is available. Some retail sales are not taxable (e.g., some states do not impose sales tax on items such as food or school supplies). And, unfortunately some businesses do not reliably report their total sales; this is particularly true in stores in which customers often pay in cash, rather than by credit card, such as restaurants, convenience stores, and hair/nail salons.

Metrics Aligned Around Transformation Strategies

In addition to these general measurements of the economic condition of a district, the revitalization initiative should also collect baseline data and track changes specific to the Transformation Strategies it adopts. Depending on the Transformation Strategy, these measurements might include characteristics like:

Number of people attending promotional events related to each of the district’s Transformation Strategies

Number of square feet of retail space devoted to products relevant to the Transformation Strategies

Number of new SKUs³ added by the district’s businesses to adapt their merchandise mix to support one of the district’s Transformation Strategies

Fortunately, there are several potential workarounds. Businesses might be willing to report overall changes in gross sales from year to the revitalization initiative (not in dollars, but in percentages). Similarly, accounting firms with retail business customers might be willing to report annual changes (again, in percentages, not dollars) for their customers, as a group, to the revitalization initiative. Or, the revitalization initiative can obtain retail sales estimates for the district, by business category, from a private-sector geospatial data company, such as ESRI or Claritas. These estimates are based on algorithms that predict changes from data from the US Census² published every five years.

Public perceptions of the district: Information on how the public perceives the district might be gathered through a community survey or through focus groups. Be sure to ask a core group of identical questions each time the survey and/or focus groups are conducted.

² The US Census Bureau conducts an Economic Census every five years, publishing aggregate data for towns, cities, and counties on retail sales and sales in other types of businesses (service, industry, wholesale, etc.). It also publishes a report on sales taking place in “nonemployer” businesses, meaning businesses with no paid employees; this category includes many “mom and pop” businesses whose owners pay themselves a draw from profits, rather than paying themselves salaries.

³ A “Stock Keeping Unit”, or SKU, is a unique number identifying each individual retail product offered for sale in a business. There is no standard practice for assigning SKUs; most manufacturers or wholesalers assign SKUs to the merchandise they sell, and store owners can choose to use these SKUs or to develop their own SKUs. SKUs are usually expressed as barcodes, with different digits of the encoded number providing information on the product’s manufacturer, description, size, color, version number, and/or other distinguishing characteristics.

SUCCESS

There are literally thousands of small actions needed to successfully revitalize a Main Street commercial district. But, no program is likely to succeed long-term without these:

/// **Commit to the long run:** Lasting change doesn't happen overnight; transforming the economy of a Main Street district takes years, with small changes gradually growing into larger ones. This includes an understanding from the public sector that ongoing investment/financial support in managing a downtown organization is necessary.

Keep a tight focus on transformation: **It is very easy to get distracted** by ideas that, while creative, do not advance the revitalization initiative's Transformation Strategies. Use your Transformation Strategies as litmus tests for the activities to which the revitalization initiative should make a commitment, rejecting or postponing ideas that are not likely to help you achieve your program's goals.

/// **Break transformation down into small steps:** Implementing a Transformation Strategy can seem like an enormous challenge until it is broken down into small, discreet steps that can be easily implemented by an individual, organization, or agency in a relatively short period of time.

/// **Don't be distracted by seemingly insurmountable problems:** Every Main Street district has at least one seemingly insurmountable problem—a prominent vacancy; a group of dilapidated buildings; a dominant, uncooperative property owner; a burdensome ordinance; or any of an almost endless list of challenges. As distracting as these challenges can be, try to focus instead on the many activities the revitalization initiative can do. As the initiative builds momentum, it will also gradually build the capacity to tackle the district's toughest problems.

/// **Build active support and involvement from both the public and private sectors:** Both sectors have unique resources, skills, and vantage points that are essential to revitalization. To achieve sustained success, both sectors must be actively involved in the revitalization initiative from the very start, and that involvement must be continued over time.



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/// **Remain organizationally flexible:** In many communities, the organizational structure that local Main Street programs have traditionally created—four standing committees, each corresponding to one of the Four Points—will work fine. But, be open to different organizational models that might work better for your community, both at the beginning of the revitalization initiative and over time, as it evolves.

/// **Push through tough challenges:** Almost all successful revitalization initiatives hit plateaus as they meet their earlier goals and look ahead to larger revitalization challenges. When your initiative hits a plateau, it may seem tempting to cycle back and repeat some of the program's earlier tasks. Resist the temptation to do so. Instead, examine the larger challenges facing the district; identify the new skills, resources, and partnerships needed to tackle them; and outline a plan to push forward.

Ultimately, Main Street revitalization is hard work, but can yield truly transformational results. And fortunately, no community needs to go through it alone. The Main Street Approach has worked successfully in older commercial districts in hundreds of towns and cities, facing every type of challenge imaginable. Tap into the strength of Main Street America—the national network of Main Street revitalization programs—to learn about what has worked, what hasn't, and why.

Finally, take a leap of faith! The single biggest obstacle to successfully transforming a Main Street district is skepticism. When people have faith that revitalization will succeed, it almost always does.

FAQ

We have an existing Main Street organization, with a standing committee for each of the Four Points. Do we need to change our organizational structure?

No. If having four standing committees is working well for your organization, there is certainly no need to change it. Rather than reconfiguring your committees, for example, you might consider reconfiguring your board meeting agenda around your Transformation Strategies so that the strategies become the central organizing element of each meeting. You may also have your committees hold an annual work plan session together and have the committee chairs meet quarterly to update each other on progress.

I've heard that the Main Street program is a three-year process. Is that correct?

No. The Main Street program began as a demonstration project implemented by the National Trust for Historic Preservation's Midwest Regional Office in three Midwestern communities. The demonstration project lasted for three years (from 1977-1980), and that's probably where this misperception began.

Managing a downtown or neighborhood commercial center is an ongoing process. In the early years, the management organization usually focuses on revitalization. Once the district is economically vibrant again, the organization can shift its focus to maintaining the positive changes and ensuring that the district stays ahead of emerging trends. But, just as shopping malls always need full-time management, downtowns and neighborhood districts always need a management group in place to help fill vacancies, keep buildings and public spaces in good condition, and market the district.

I heard we have to create a separate nonprofit organization for our Main Street program. Is that true? What if we want to do this within another sort of organization, like a city government agency or a chamber of commerce?

Historically, most local Main Street programs have been organized as freestanding nonprofit organizations, with partner organizations represented on the programs' boards of directors and committees. Organizing a new Main Street program as a freestanding entity offers the benefit of a clean start for the district's revitalization efforts, with no organizational baggage and with a fresh look at the possibilities for the district's future.

However, there are plenty of successful exceptions. For example, if there is an existing organization or agency that is widely perceived within the region to be a competent, successful leader, and if it has the capacity to house the revitalization initiative, it might be an excellent candidate to host a Main Street organization. And/or, as the local Main Street program evolves, it might find that spinning off one or more parts of its work to other organizations or agencies—or even absorbing or merging with another organization—might boost its effectiveness. The important thing is for the revitalization initiative to focus on one to three Transformation Strategies for the district that involve activities in all Four Points of the Main Street Approach.

Our organization conducted a market analysis two years ago. Could that be helpful to us in choosing Transformation Strategies?

Yes. There might be some information you will need to update, like the district's business inventory and the region's demographic characteristics, but a market analysis less than two or three years old will usually provide a good foundation of demographic information and information about retail sales patterns.

What if someone comes up with a great idea that doesn't really advance one of our Transformation Strategies?

Steve Jobs, the legendary co-founder of Apple, once said "People think focus means saying yes to the thing you've got to focus on. But that's not what it means at all. It means saying no to the hundred other good ideas that there are. You have to pick carefully." It might be difficult to turn away good ideas that do not advance one of your revitalization program's Transformation Strategies, but maintaining a tight focus on those strategies is very important. Explore ways to tweak ideas so that they might fit into the new revitalization agenda, and always encourage the community to contribute ideas.

What is a Catalyst Strategy and how is it different from a Transformation Strategy?

A Catalyst Strategy is an off-the-shelf Transformation Strategy that can apply to a wide range of places. Think of the Catalyst Strategies as a starter set of

Transformation Strategies. You can choose among them based on appropriateness to your situation, and you can customize them or define your own Transformation Strategies over time.

Aren't these strategies kind of generic?

Yes, the Catalyst Strategies are meant to be generic. But they are implemented based on your own community's particular market characteristics. And you can refine the strategies to make them fit your needs.

How is this different from the "old" Main Street program?

In the "old" Main Street, the Four Points (represented by four committees) were the organizing principle, thus while presenting a solid basis to focus your work comprehensively, it did not necessarily promote work based on a competitive market advantage or position for the downtown/district.

In the new Main Street, Transformation Strategies are the organizing principle and the organizational format is flexible. The old Main Street tended to create committee silos where projects happened in an ad hoc fashion. In the new model, the activities in the Four Points should stem directly from and be aligned with the Transformation Strategy.

How will we be sure we picked the right strategies?

You should choose your initial Transformation Strategies based on some basic market research and community engagement, including:

- // Understanding of your area's demographic composition and any known population trends;
- // Sales leakage analysis, to understand where household spending is going;
- // Business inventory assessment, to identify clusters, strengths, and weaknesses by industry or sector; and
- // Community feedback, shopping habits and attitudes.

Any Transformation Strategy should pass the "common sense test" and a good place to start is to answer the screening questions described in this document.

Do the strategies ever change?

Yes. Strategies are intended to be long-range but not permanent. Markets shift, demographics change over time, and the dynamics of retail, entertainment, manufacturing, office, and housing uses are constantly evolving. You should plan to revisit and confirm your Transformation Strategies every three to five years, or sooner if there is a significant development or shift in the local economy.

A strategic approach is fine, but what if our problem is that we have a lot of vacancies?

A Transformation Strategy should help to rebuild the local economy and fill vacancies in a rational, supportable way. It should be a rallying point that owners of vacant properties should also support. In this way, the Transformation Strategy can bring more order to business development and reduce the number of under-capitalized businesses that open and then quickly close.

What if I have a lot of independent-minded property and business owners? Will they support a Transformation Strategy?

Traditional business districts lack uniform ownership and management, so it has always been a challenge to get everyone moving toward the same goal. Still, it is more likely that independent operators will support a strategy that is rational and economically grounded. Even if only some independent operators become advocates for the strategy, that is a step in the right direction. (A tip: Enlisting them in the strategy-development process will make them more likely to support the agreed direction.)

Revenue		Budget Through 2019	Weight	2020 Budget	Weight	2021 Budget	Weight
	Corp Donations	15,000.00	6%	12000	5%	12000	5%
	Membership	6,000.00	3%	8000	3%	9000	4%
	Jackson County	20,000.00	8%	20000	8%	20000	8%
	EID/City	98,000.00	41%	98000	40%	98000	39%
	Christmas light donations	6,000.00	3%	7000	3%	8000	3%
	Greenway donations	10,000.00	4%	5000	2%	5000	2%
	Hanging basket donations	31,000.00	13%	31000	13%	31000	12%
	Grants		0%	10000	4%	10000	4%
	Fundraising Events	20,000.00	8%	20000	8%	20000	8%
	Website Advertising	3,000.00	1%	3100	1%	3200	1%
	D&D in the Streets	25,000.00	10%	26000	11%	27000	11%
	Merchandise	2,500.00	1%	2750	1%	3000	1%
	Street/sidewalk Cleaning	2,000.00	1%	2250	1%	2400	1%
	Loans	1,011.00	0%	0	0%	0	0%
Total		239,511.00		245100		248600	
Expenses							
Personnel							
	Insurance	1,300.00		1300		1300	
	Executive Director	80,000.00		80000		82000	
	Benefits	3,400.00		3400		3400	
	Payroll Tax	6,380.10		6380.1		6533.1	
	Filing Fees	1,000.00		150		150	
		92,080.10		91,230.10		93,383.10	
Office							
	Rent	6,000.00		6000		6000	
	Utilities	900.00		900		900	
	Internet	1,200.00		1200		1200	
	Office Supplies	1,200.00		1200		1200	
	Postage	2,500.00		2500		2500	
	Equipment Repair	100.00		200		300	
	Dues & Subscriptions	600.00		600		600	
		12,500.00		12,600.00		12,700.00	
Other							
	Printing	2,570.00		2570		2570	
	PR	2,000.00		2000		2000	
	Ad & Promos	4,000.00		4000		4000	
	Website	6,000.00					
	Merch	2,500.00		2700		2500	
	Loans Repaid	1,011.00		1011		1011	
	Misc	20,500.00		21000		21000	
		38,581.00		33,281.00		33,081.00	
Projects/Initiatives							
	Fundraising/Event	10,000.00		12000		13000	
	Christmas lights	20,000.00		6800		7000	
	Street Cleaning	2,200.00		2500		2200	
	D&D in the Streets	25,000.00		26000		27000	
	Greenway Project	8,000.00		8000		8000	
	Hanging Baskets	30,875.00		30875		30875	
		96,075.00		86,175.00		88,075.00	
Total Expenses		239,236.10		223,286.10		227,239.10	
Total Rev/Loss							



MEMORANDUM

Subject Homeless System Action Plan
To Mayor and City Council *for April 25, 2019 study session*
From Angela Durant, Principal Planner
Date April 16, 2019

COUNCIL DIRECTION

Staff is seeking direction on the following questions related to the attached Homeless System Action Plan (Action Plan):

- Does Council have questions or concerns regarding the findings and/or recommendations presented in the Action Plan?
- Is Council in favor of adopting the Action Plan?
- Are there specific actions Council would prefer implementing as priority?

PRESENTATION OUTLINE

- Introduction – Angela Durant
- Presentation of Findings and Recommendations
 - Kris Kuntz, LeSar Development Consultants
 - Maureen Richey, LeSar Development Consultants
- Discussion and Direction – Mayor and City Council

PREVIOUS STUDY SESSIONS ON THE TOPIC

None

BACKGROUND

Over the past several years, the City has been working diligently to identify opportunities and actions to address homelessness. This has been a labor intensive process as the City looks to better understand its role and to most strategically invest resources to contribute to appropriate and impactful solutions. The U.S. Department of Housing and Urban Development (HUD) encourages the City to coordinate activities funded through the Community Development Block Grant (CDBG) program with the efforts of the Jackson County Continuum of Care (CoC), among other community resources, to target chronic homelessness. The CoC is the local body tasked by HUD to implement the requirements of the Homeless Emergency Assistance and Rapid Transition to Housing (HEARTH) Act and the 2012 CoC Program Interim Rule.

There are many ways City Council can invest CDBG resources to coordinate with and better support the CoC. However, until the recent restructuring of the CoC, the City was not sufficiently informed of the most appropriate opportunities. After research and discussions with HUD, the City decided to allocate CDBG resources for the completion of a Homeless System Action Plan. The primary objective of the Action Plan is to provide the City with a road map of appropriate goals and actions based on a professional assessment of the community's current homeless crisis response system.

Through a competitive Request for Proposal process, LeSar Development Consultants (LDC) was selected among five other consultants by a six-member review committee to complete the work. In January 2019, LDC began working with City staff and several key stakeholders to conduct research on the region's homeless situation and impact; recent efforts and resources available to address the issue; and an assessment of the existing response system, all of which resulted in the recommendation of five goals and 31 actions. An overview of the following goals is provided on page 7 of the Action Plan and described in greater detail on pages 48-56:

- 1) Increase Supply of Affordable Housing and Supportive Housing (9 actions)
- 2) Increase Leadership, Collaboration and Funding (10 actions)
- 3) Address Unsheltered Homeless and Encampments (4 actions)
- 4) Increase Temporary Housing Programs and Placements (4 actions)
- 5) Increase Diversion and Prevention Strategies (4 actions)

Only six of the recommended actions are identified as the City's sole responsibility (see pages 48-56). The remaining 25 require partnership with other agencies including but not limited to the CoC, Jackson County, Housing Authority of Jackson County, ACCESS, VA Southern Oregon Rehabilitation Center and Clinics, Rogue Valley Council of Governments, Coordinated Care Organizations, nonprofit service providers, the hospitals, our faith-based community, and local business partners.

Research Methodology

LDC and City staff integrated the following research methods in the development of the Action Plan:

- Local tours of encampments and homeless facilities
- Small-group listening sessions
- In-person and call-in stakeholder interviews
- Targeted stakeholder survey assessing crisis system strengths and opportunities
- Analysis of data collected from the CoC, local planning documents provided by the City, accredited academic research, and other secondary sources including case studies

CITY COUNCIL OPTIONS

At this point the Council could take either of the following actions:

- Direct staff to prepare a resolution to adopt the Action Plan.
- Direct staff to incorporate any recommended changes and conduct another study session.



City of Medford

April 2019

Homeless System Action Plan



Acknowledgements

The City of Medford is pleased to present this Homeless System Action Plan (Action Plan) to members of the City Council and leaders throughout the region. Addressing homelessness and housing instability in Medford, Jackson County, and throughout the Rogue Valley will require collaboration and buy-in from a myriad of partners across multiple sectors.

Development of this Action Plan was funded through the City's Community Development Block Grant (CDBG) program, a U.S. Department of Housing and Urban Development entitlement program that provides the City with annual funds to address a variety of community needs. Mercy's Gate Rogue Valley; a nonprofit organization that supports people working hard but struggling to make it in the Rogue Valley, also made a generous contribution to the plan's development.

The City wishes to acknowledge the work of LeSar Development Consultants (LDC) in preparing this report along with City staff. We also wish to acknowledge the participation of service providers, City and County government, faith-based groups, nonprofit service providers, housing developers, members of the business community, healthcare partners, and others in providing input and background information for this report.

Representatives from the Jackson County Continuum of Care, the County, Rogue Retreat, City of Ashland, the Housing Authority of Jackson County, Columbia Care, Maslow Project, ACCESS, La Clinica, faith-based partners, the Medford Chamber of Commerce, the Downtown Medford Association, the Medford Police Department, City Leadership staff, and the Medford City Council all shared thoughts and input via phone and in-person interviews that were vital to drafting the assessment and recommendations listed herein. Additionally, more than 80 people representing numerous stakeholder groups in the community completed an email survey assessing the strengths and opportunities for the homelessness response system.

A site visit to Medford/Jackson County in January 2019 was also integral to crafting this Action Plan. The City of Medford and LDC would like to thank Mercy's Gate Rogue Valley and other members of the faith-based community for making that site visit possible. The City would like to thank Rogue Retreat, the Medford Gospel Mission, Hearts with a Mission, and the Medford Police Department for giving their time to provide tours during the site visit.

The City of Medford looks forward to implementing many of the proposed action steps in conjunction with these cross-sector, inter-agency partners as well as members of the community. Working together, we can reduce homelessness in the City, County, and region. Thank you and we look forward to next steps.

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Executive Summary

Homelessness has reached a critical point in Medford and across Jackson County. Although the number of people experiencing homelessness has reached crisis levels, the newly structured Jackson County Continuum of Care (CoC) and engagement of regional leaders across multiple sectors has generated new momentum and a greater willingness to address the issue at a regional level.

As the new CoC continues to take shape and build a powerful presence, the City wanted to better understand its role in addressing homelessness and create specific goals for the City that could also be adopted by the larger region. With this direction, the City hired LeSar Development Consultants (LDC) to work with staff to create the plan. The primary objectives of this Action Plan are to:

- Leverage recent momentum to accelerate innovation and regional collaboration
- Gain a better understanding of the drivers of homelessness
- Assess strengths and challenges and highlight best practices
- Identify goals and strategies for the City and potential partners
- Develop performance-based funding strategies to accomplish goals
- Share goals and strategies with the larger region for potential adoption

The document should also be considered a jumping off point for City leadership to engage in more intentional discussions with critical partners, such as the County and other CoC stakeholders. Homelessness will not be solved by a single entity, such as the City, and will require multiple partners working together to leverage individual and collective strengths and resources to reduce the impact of homelessness on individuals and on communities throughout the region.

When specifically looking at city statistics, the exact number of persons experiencing homelessness within the city limits is unknown. However; according to the regional 2018 Point-In-Time (PIT) Count, a total of 732 persons were homeless on a given night in January. This is the highest number reported in the last five years; and 72% of those that responded to the survey question on where they reside, indicated they are experiencing homelessness in Medford. Other data sources suggest that a high concentration of unsheltered homeless individuals are living along the Bear Creek Greenway.

Homelessness is a complex societal problem, with a lack of affordable housing at its core. In the city, vacancy rates are low, the cost of housing is high, and many have incomes below the poverty level. This leaves many households rent-burdened or facing eviction, which happens on a daily occurrence. While housing should be a key focus, other factors such as employment, mental illness, substance use disorders, domestic violence, physical health, and education need to be considered. According to the 2018 PIT Count, of all homeless single adults in the region, 43% were considered chronically homeless with lengthy or repeated histories of homelessness and a disabling condition, 26% reported a severe mental illness, and 21% reported a chronic substance abuse disorder (figures can be duplicated).

Many of these factors are contributing to the extreme personal and societal costs resulting from homelessness. Individuals have passed away on the streets in recent years; and with the Medford School District reporting the second highest number of homeless students of all districts in the state, many students are facing high barriers to self-sufficiency and future economic productivity. Homelessness is also a financial burden with significant resources being spent on encampment clean-

ups by Police and the Parks and Recreation Department, as well as Fire Department response. Homelessness is also affecting local business and tourism. According to the Medford Chamber of Commerce and the Downtown Medford Association, homelessness is a frequent topic of concern often cited by tourists and customers as a key factor deterring them from patronizing local businesses, the Greenway, and other parks and facilities.

The region-wide community is addressing homelessness more aggressively than ever before through engagement, leadership and collaboration. Most of the momentum at this time is coming from the newly structured CoC. The City played a critical role in restructuring the CoC with the City Manager serving as the board chair for the first year and the City Council dedicating funding to support the CoC Manager position. The CoC is now serving as the region's catalyst to advance systems-level change to end homelessness. However, even though many key leaders and stakeholders actively participate in the CoC, actual resources to address homelessness in the region are grossly insufficient.

In 2018, the CoC received \$246,953 in federal funding from the U.S. Department of Housing and Urban Development (HUD), or \$337 on average per homeless person. This was the smallest and lowest per capita federal funding of any CoC in the state. The highest funded state CoC (Hillsboro, Beaverton/Washington County CoC) received \$3,853,943, or \$7,383 per person. Although the CoC is making significant progress, increasing funding is going to take time and sustainable support from the City, County and other community partners.

The City currently estimates approximately \$1.6 million in annual funding available to address housing and homelessness. Sources include HUD's Community Development Block Grant (CDBG) program, the City's General Fund Grant (GFG) program, and the newly adopted Construction Excise Tax (CET) program. While CDBG funds may be used for public services and housing related projects; the City's GFG program is currently reserved for essential support services, and the CET program is legally restricted to programs and incentives for development of affordable housing. City Council also approved approximately \$20 million in Medford Urban Renewal Agency (MURA) funds to be expended through 2024. These funds may be allocated to affordable and workforce housing development, as directed by the MURA Board. (See pages 24-28 for more details on City resources.)

Consistent City investments have been made to housing rehabilitation, homeless youth outreach and emergency shelter services, domestic violence, addiction recovery, and rental assistance. More recent, notable CDBG projects have spurred development of 118 affordable housing units, an 8-10 bed transitional housing/vocational training facility for homeless and at-risk youth, and expansion of Compass House's Clubhouse to help people with mental illness.

The County also invests resources to assist with addressing and reducing homelessness. Although an estimate of annual available funding was not specifically provided, the County reported spending just over \$1 million on programs and services since July 2014. Funded services included rental assistance, homeless outreach, emergency and transitional housing services, adult foster care, domestic violence, and peer-based mental health crisis support. Notably, over 50% of the County's total reported investment was allocated to Compass House for initial set up costs. (See pages 29 and 78 for more details on County resources.) Relatively speaking, the County's reported investment in addressing homelessness is significantly low in relation to their role and responsibilities in the region.

The County did not provide details on funding for behavioral health services, including mental health and substance use disorders that are not specifically targeted to homelessness, but in fact benefit homeless individuals. However; according to the 2018 Community Health Needs Assessment of Jackson and Josephine Counties, healthcare providers indicated that substance use disorder services were lacking in both counties, and that Jackson County specifically had fewer mental health providers per capita compared to Josephine County and the state as a whole. (See Appendix K for information on the programs and services offered by Jackson County Mental Health.) Lastly, the County is considering opening a new jail that they report would help address homelessness by providing services to homeless individuals while incarcerated.

The CoC, City, and County are not the only entities that provide funds to address homelessness. The City of Ashland, other local governments, Housing Authority of Jackson County, and ACCESS play a critical role; while the White City VA provides support to homeless Veterans, and other non-profits and faith-based organizations help out as well. Lastly, the region's two Coordinated Care Organizations (CCOs), AllCare Health and Jackson Care Connect, work together to provide healthcare services to individuals and families as part of Oregon's Medicaid Health Plan. Both CCOs have provided some funding locally to address homelessness and have prioritized housing as a critical social determinant of health.

Although there are multiple entities with resources available to address homelessness, they are doing so with little coordination and a serious lack of housing and services to meet the current needs. On a positive note, Veteran homelessness has declined over the last five years, even with potential for in-migration among homeless Veterans. However; when examining Permanent Supportive Housing (PSH) resources in the region, 70% are strictly for homeless Veterans. This leaves only 35 total PSH beds to non-Veteran single adults, which is the population in greatest need. Similarly; the region has available only 87 total Rapid Re-Housing (RRH) beds, with 83% dedicated to homeless Veterans and their families. The region's significant lack of resources has resulted in an immediate need to create a minimum of 245 PSH units for non-Veteran single adults and 14 for non-Veteran families. The estimated immediate need for RRH units is 83 for non-Veteran adults and 22 for non-Veteran families. These numbers should be considered minimums based on 2018 PIT Count data; however, the need seems to be increasing as more reliable Coordinated Entry Data (CES) is collected.

The region is also lacking emergency shelter, especially year-round, low-barrier emergency shelter beds for all populations. Rogue Retreat provides 50 beds of low-barrier emergency shelter in the city, but that well-run program only operates during the winter months and is full every single night. Lastly, very few resources are dedicated to providing street outreach services in Medford and the region. In the city, the only non-police outreach is for Veterans and young adults. The Medford Police Department does provide some support, but the level of outreach is not adequate and officers are not equipped to do the job of street outreach workers.

There is no denying the significant lack of resources being dedicated to homelessness across the region, and while this feels defeating, having knowledge of these challenges can open new avenues for discussion, partnership, and strategies. The CoC is a bright spot for the region and can be the vehicle to drive change and the creation of a robust homeless crisis response system. A homeless crisis response system is the community structure that ensures those who are at-risk of or experiencing homelessness can quickly access housing and services that best meet their needs. All

communities must have a holistic and systematic response to which all leaders, stakeholders, and programs are committed to ensuring homelessness is prevented whenever possible, and that it is otherwise rare, brief, and non-recurring.

The response system needs to include critical components such as outreach; coordinated entry; prevention and diversion; emergency shelter and interim housing; and permanent housing including RRH, PSH, and affordable housing. Most importantly, effective response depends on strong leadership, a shared vision, and collaborative funding. The region; including the City, needs to embrace this model and ensure the necessary and appropriate components are in place to achieve the vision. Many organizations and leaders in the region do embrace this system, but others may be resistant to change. While the City is not solely responsible for creating or implementing all of the components of a crisis response system; it is a key stakeholder in the region and should share the responsibility with the CoC, County, and other community partners.

Many of the components of the homeless crisis response system are in place, although potentially not at the desired level, or are actively in development. The following considerations are relevant to both the City and the region when taking into account potential improvements to the current system. These considerations form the basis for the goals and strategies outlined in this plan:

Promote and Provide Regional Leadership:

- As the *Ten-Year Plan* ends, regional partners should renew their commitment to a shared vision to address homelessness and guide activity toward achieving shared regional goals.
- The City should continue to provide a leadership role within the CoC, including dedicating a single agency or staff position to serve as the homeless lead.
- The City should leverage its position as a convener and play a role in formalizing and strengthening partnerships with faith-based organizations, public agencies, and others.
- The City should help define a role for businesses, including the Downtown Medford Association and the Chamber of Commerce, and continue to build critical partnerships with the healthcare sector, specifically the CCOs.
- The City needs to support national best practices for addressing homelessness by ensuring all contracts for homeless funding are required to follow critical best practices such as Housing First. Adopting best practices may represent a significant culture change, but investing in ongoing education can help ensure there is sufficient buy-in when adopting evidence-based best practices.

Increase City and Regional Funding and Collaboration

- Both the City and County need to direct more local funding to homelessness and specifically toward best practice activities that demonstrate a significant rate of return.
- The City needs to support the building of a collective performance-focused culture. The development and implementation of data tracking tools and performance metrics are essential to understanding how well the homeless system is performing. Data and performance should also be central in funding decisions.
- The region should pursue the creation of a public/private funders' collaborative to ensure transparency about where funds in the region are currently being deployed; engage in

shared discussions about what priorities/activities to fund, based on regional gaps; and make more intentional and coordinated decisions when awarding local funds and applying for and leveraging other state/federal funds.

Increase Street Outreach Services to Engage Unsheltered Population Including Those in Encampments

- The City and region needs to immediately increase street outreach services for populations other than youth and Veterans. New resources should not be in the form of new Police staff, but rather increased staffing at area non-profits. The City should partner with the County to create new outreach resources that can work in close partnership with law enforcement personnel.
- The City should pilot an outreach program in partnership with the CoC and the County to address encampments located along the Greenway; identifying 10-20 high-vulnerability individuals to receive intensive outreach and strive for temporary and permanent housing placements.

Analyze Prevention Resources and Expand Diversion

- The CoC, City, and County should work together to examine how funds are currently being allocated for homelessness prevention and emergency rental assistance. Adjustments should be made to ensure that low-income and struggling households who are most likely to end up homeless are identified and targeted for support.
- Diversion should be implemented across various programs including outreach and shelter. Effective diversion would most importantly ensure that shelter beds are reserved for those who truly have no other option.

Support the Creation of Low-Barrier Shelter and Interim Programs

- The City should support the creation of a year-round, low-barrier shelter that includes beds for single adults, couples, and families to receive basic resources such as showers, laundry, meals, and a safe, indoor place to sleep while they are supported with finding a permanent housing situation.
- The City should engage the faith-based and nonprofit communities to consider using existing parking lots for safe parking programs.

Increase Permanent Housing Options Especially Rapid Re-Housing, Permanent Supportive Housing, and Affordable Housing

- Regional leadership needs to embrace the concept that homelessness is at its core a housing issue. The City and region should set annual affordable housing production goals and work hard to meet them.
- The region, including the City, needs to significantly increase its supply of RRH, PSH, and affordable housing to help increase the flow of people through the CES. RRH should be a priority as it can be brought online much quicker since it does not require new development.
- The City, County, and Housing Authority need to partner on PSH development via new development or the acquisition/rehab of other properties such as underutilized

hotels/motels. PSH has been proven nationally to be the most effective model for decreasing chronic homelessness.

- Partners need to ensure that services provided in PSH are adequate to meet the need. One figure provided on the cost of PSH locally was \$11,358, which included both housing and services. This figure is relatively low when compared to other PSH figures, nationally. For PSH to be effective with those with the most complex needs, more funds must be dedicated to providing intense wrap-around supportive services.
- The City or County could partner with the Housing Authority to fund services that could be paired with Housing Authority vouchers for rapid creation of PSH. The region should explore partnering with local hospitals and CCOs on a PSH pilot that could provide funds for supportive services.
- The CoC should partner with cities and the County, and especially the Housing Authority, to develop and implement a landlord engagement program throughout the region. The program should include landlord outreach and education, as well as financial incentives such as paid security deposits, holding fees, damage mitigation funds, and move-in supplies.

Overview of Goals and Actions

The following table is an overview of recommended goals and actions. More detail is available in the Goals and Actions section of this report.

<p>Goal #1: Increase the supply of affordable and supportive housing</p> <ul style="list-style-type: none"> • Action 1.1: Continue implementing Housing Advisory Committee recommendations. • Action 1.2: City and County work together to set annual housing production goals. • Action 1.3: City and County inventory available publicly-owned land suitable for housing development. • Action 1.4: Engage landlords with a region-wide landlord incentive program. • Action 1.5: Increase Rapid Re-Housing for non-Veteran households. • Action 1.6: Increase supply of Permanent Supportive Housing for non-Veteran households. • Action 1.7: Launch a cross-sector pilot targeting frequent users of healthcare system. • Action 1.8: Explore zoning changes that may facilitate affordable housing development. • Action 1.9: Expand Accessory Dwelling Unit programs.
<p>Goal #2: Increase leadership, collaboration, and funding</p> <ul style="list-style-type: none"> • Action 2.1: Identify City staff person to oversee implementation of this Action Plan. • Action 2.2: Continue to estimate public costs of managing homelessness. • Action 2.3: Create a cross-sector funders' collaborative. • Action 2.4: Create a collaborative between City and faith-based partners. • Action 2.5: Create a City and business sector working group. • Action 2.6: Create a lived-experience Advisory Board to provide input on City activities. • Action 2.7: Create an area resource map using GIS. • Action 2.8: Continue to enhance CoC infrastructure and capacity. • Action 2.9: Require adherence to best practices and community standards in City contracts for homeless services. • Action 2.10: Establish a performance culture in City contracts where grants are awarded based on demonstrated positive outcomes.
<p>Goal #3: Address unsheltered homelessness and encampments</p> <ul style="list-style-type: none"> • Action 3.1: Create an ad hoc working group to address Greenway encampments. • Action 3.2: Increase resources for street outreach services. • Action 3.3: Pilot intensive services to targeted high-need individuals on the Greenway. • Action 3.4: Update City policies related to encampment abatement.
<p>Goal #4: Increase temporary housing programs and successful placements</p> <ul style="list-style-type: none"> • Action 4.1: Continue to support the creation of a year-round, low-barrier shelter. • Action 4.2: Consider creating a Central Access Point as part of the shelter. • Action 4.3: Require temporary housing programs receiving City funding to adhere to Housing First principles. • Action 4.4: Work with faith-based groups to expand safe parking programs.
<p>Goal #5: Increase diversion and prevention strategies</p> <ul style="list-style-type: none"> • Action 5.1: Increase resources for homelessness prevention and ensure that prevention funds are used efficiently. • Action 5.2: Support legal services to prevent evictions wherever possible. • Action 5.3: Increase diversion training and activities. • Action 5.4: Promote shared housing as part of a diversion strategy.

Purpose

Medford like many communities across the state of Oregon, is working to better address the needs of its homeless neighbors and support people in accessing a safe and stable home. While individuals and families experiencing homelessness may have a multitude of unique challenges, including but not limited to mental health and substance use issues, homelessness is fundamentally a housing problem with extreme societal costs. Homelessness is acutely stressful for individuals and can have significant long-term repercussions on their health, well-being, and economic stability. In some cases, homelessness can result in death. Homelessness also negatively affects the community and local businesses, and can be costly for public systems, including various City departments and regional partners, such as the criminal justice and healthcare systems. To help alleviate these impacts, families and individuals experiencing homelessness need to have permanent housing and the right supports to remain housed.

Homelessness has reached a critical point in the city and county and many residents express that the region is not doing enough to address homelessness. In a 2018 study completed by the Southern Oregon University (SOU) School of Business; 97% of county residential survey respondents perceived homelessness to be a problem, with two-thirds saying the region is “not doing enough to help the local homeless population.”¹ According to supplemental PIT questions, many of the 732 total persons experiencing homelessness on that single night in January 2018 reside in the city. As the demographic and economic hub of southern Oregon, the City identifies as an essential partner in the regional effort to end homelessness, defined by the U.S. Interagency Council on Homelessness (USICH) as ensuring that homelessness is “rare, brief and non-recurring.”² The City also seeks to contribute to the improvement of the region’s homeless response system through the development of this Homeless System Action Plan (Action Plan).

The City has been working diligently with the Jackson County Continuum of Care (CoC), members of the community, and stakeholders and partners at the local, state, and federal levels to identify potential solutions. Despite many successful collaborative efforts in recent years, the complexity of the issue, market conditions, and scarcity of resources continue to overwhelm the region.

Objectives

The primary objective of this Action Plan is to leverage recent momentum to accelerate innovation and collaboration in the region. This plan aims to identify key change agents, prioritizes an effective agenda of realistic short- and longer-term goals, and supports the development of a sustainable system of best-practice programs and services. To assist the City in taking next steps, locally and within the larger region, the City initiated the development of this Action Plan to achieve the following:

¹ City of Medford Residential Homelessness Survey 2018, prepared by SOU MBA students (March 2018)

² US Interagency Council on Homelessness, “What Does Ending Homelessness Mean?” June 4, 2018.

<https://www.usich.gov/goals/what-does-ending-homelessness-mean/>.

1. Gain both a high-level and a nuanced understanding of homelessness in the city and region, including affected populations and sub-populations, ongoing efforts, available resources to address homelessness, and impacts on the City and its partners.
2. Assess the strengths and challenges of the current City and regional homeless response system.
3. Highlight best practices currently being implemented and build the political will to bring them to scale
4. Create a strategic framework with clearly identified goals, strategies, and action steps that the City and identified partners can implement to support the goal of ending homelessness within the city and region
5. Develop a performance-based funding strategy and establish strategic, collaborative partnerships with regional stakeholders to accomplish local and regional goals.
6. Share the goals and strategies outlined in the framework with neighboring cities, the County, and the larger region for potential adoption.

Development of the Action Plan

The City hired LeSar Development Consultants (LDC) to assist staff with developing this Action Plan over the course of several months. To develop the Action Plan, LDC and City staff completed the following activities:

- Reviewed current and historical documents, reports, and studies related to homelessness in the city and county. (See Appendix A.)
- Conducted secondary research using existing reports and case studies on homelessness.
- Completed an initial in-person site visit funded by Mercy's Gate Rogue Valley to meet with City and regional leaders and stakeholders, tour areas with high unsheltered populations and encampments along the Bear Creek Greenway, and visit local homeless services programs such as the Kelly Winter Shelter, Rogue Retreat's Hope Village, Hearts with a Mission, and the Medford Gospel Mission.
- Reviewed available data such as the CoC PIT Count reports, CoC Housing Inventory Count (HIC) reports, CoC System Performance Measures report, data from the regional Coordinated Entry System (CES), and performance data from the Homeless Management Information System (HMIS), such as Annual Performance Reports (APR) for emergency shelter, Rapid Re-Housing (RRH), and Permanent Supportive Housing (PSH).
- Interviewed key stakeholders identified by the City, including representatives from the CoC, Community Action Agency, nonprofit homeless services providers, and affordable housing developers, as well as from County agencies, healthcare, and faith-based partners (Appendix B).
- Reviewed survey feedback from regional stakeholders (Appendix C).
- Regularly communicated with City staff overseeing plan creation.

The above activities contributed both to the assessment of the present system and to the creation of actionable goals and strategies.

Overview of Homelessness in Jackson County

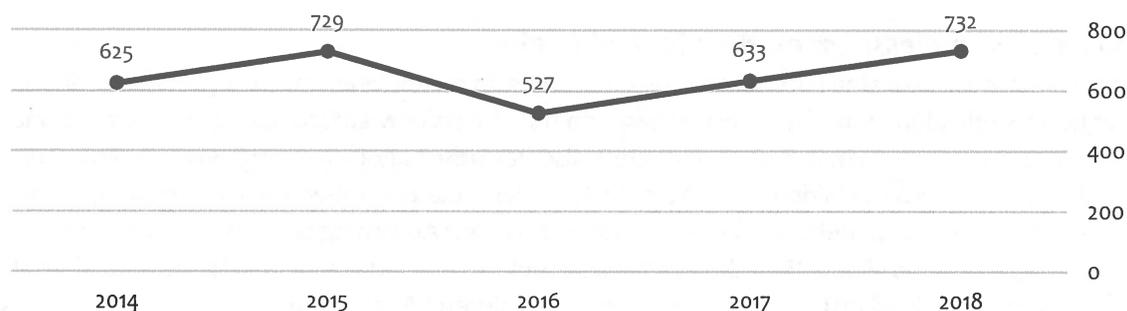
The following overview covers several topics that contribute to understanding the drivers and impact of homelessness within the county:

1. PIT Count Data for the City of Medford and Jackson County
2. Impacts of Homelessness on the City and Region
3. Regional Housing and Economic Issues
4. Regional Efforts to Address Homelessness
5. Coordinated Entry and System Performance Data
6. Resources to Address Homelessness

Point-in-Time Count Data for Jackson County and Medford

Housing and economic challenges, including rising rents and low vacancy rates, influence rates of homelessness in Jackson County. Although rates of homelessness have remained relatively constant over the past five years, numbers have trended upward and in 2018 were more than 33% higher compared to 2013. Figure 1 below highlights the total homeless persons in the region's PIT Count over the past five years.

Figure 1. Jackson County: Total Persons Experiencing Homelessness



Source: Jackson County CoC PIT Count.

In 2018, the PIT Count saw the highest number of total homeless persons counted in the previous five years with 403 persons in shelters and 329 persons living unsheltered countywide.

While the five-year trends across both the sheltered and unsheltered counts appear stable, the trend lines change at the sub-population level. For example, the region has seen a significant decrease in total Veterans experiencing homelessness, no significant change among transition age youth, and an increase in the number of persons considered chronically homeless (defined as having lengthy and/or repeated episodes of homeless and a disability), as well as increases in those reporting a severe mental illness and a substance use disorder. See Appendix E for more information on sub-population trends in the region.

An analysis of supplemental PIT Count data shows the self-reported residences of people experiencing homelessness.

Of the 368 individuals who responded to questions about where they reside, 72% reported living in Medford. Figure 2 provides a breakdown of reported residence by city.

Figure 2. Jackson County 2018 Point-in-Time Count – Reported Residence by City

City	Number of Homeless Persons Reported Residing in City	Percentage of Total (N = 368)
Ashland	38	10%
Butte Falls	4	1%
Central Point	14	4%
Eagle Point	4	1%
Grants Pass	9	2%
Medford	266	72%
Phoenix	13	4%
Prospect	4	1%
Rogue River	4	1%
Ruch	1	0%
Shady Cove	3	1%
Talent	5	1%
White City	3	1%
Total	368	

Impact of Homelessness on the City and Region

Homelessness has extreme societal and personal costs. In recent years, news reports have drawn attention to individuals who have passed away on the streets of Medford due to the weather and other circumstances.^{3, 4} Enduring homelessness also has other significant long-term negative impacts on individuals, especially children. For example, homelessness can impede a child’s development, educational attainment, and later success in the workforce.⁵ According to a 2018 report by the Oregon Department of Education, the Medford School District had the second highest number of homeless students in all districts in the state at 1,164 children.⁶ Such a large population of homeless students will continue to have a negative effect on the City in the future.

³ Pfeil, Ryan, “Police Say It’s Likely that Homeless Man Died from Exposure,” *Mail Tribune*, January 4, 2016. <http://mailtribune.com/news/crime-courts-emergencies/police-say-it-s-likely-that-homeless-man-died-from-exposure>.

⁴ Conrad, Chris, “Homeless Man Freezes to Death Monday in Downtown Medford,” *Mail Tribune*, January 3, 2013. <http://mailtribune.com/news/crime-courts-emergencies/homeless-man-freezes-to-death-monday-in-downtown-medford>

⁵ American Psychological Association, “Effects of Poverty, Hunger, and Homelessness on Children and Youth,” <https://www.apa.org/pi/families/poverty>.

⁶ Oregon Department of Education, *Oregon Statewide Report Card 2017-18*, “Homeless Students in Oregon,” <https://www.oregon.gov/ode/schools-and-districts/grants/ESEA/McKinney-Vento/Documents/State%20Summary%20Data%202017-18%20for%20web.pdf> *The McKinney-Vento definition of homelessness is used when identifying homeless youth.

It is important to note that schools use the McKinney-Vento definition of homelessness, which is broader than the HUD definition and includes families doubled-up in housing or youth who are couch surfing.⁷

The human cost of homelessness is compounded by the significant public financial costs. The following describes some of the immediate financial costs to the city and region related to managing homelessness.

Encampment Cleanups

The Medford Police Department (MPD) conducts several clean-ups of the Greenway every year. In total, MPD estimates they spend nearly \$30,000 per year directly on homelessness, mostly in overtime paid to patrol officers aiding in Greenway clean-up efforts.⁸ MPD posts a notice 24 hours before each clean-up, and estimates that each clean-up costs \$2,500, which includes the crew and the cost of renting a dumpster. The City estimates that on average two tons of trash and debris are removed each clean-up. Additionally, the Medford Parks and Recreation Department estimates about \$143,031 in annual costs related to encampment clean-ups along the Greenway, including clearing trash, mowing, riparian mitigation, maintenance, and infrastructure repairs. These estimated Greenway clean-up costs for Parks and Recreation do not include other homelessness-related maintenance and clean-up activities on the other 510 acres of City park space.⁹ According to MPD, these clean-ups are very time and labor intensive and the activities do not directly reduce homelessness.

Encampment sweeps are conducted in accordance with MPD Policy #464, which sets protocol for addressing homeless encampments, creates a Homeless Community Liaison position embedded within the police force, and sets standards for police interactions with individuals with mental illness or mental impairments.¹⁰

Public Health

As noted in the PIT Count data, many individuals experiencing homelessness in Jackson County report having a serious mental illness, substance use disorder, and/or chronic health condition that requires access to health and behavioral healthcare. According to the 2018 Community Health Needs Assessment of Jackson and Josephine Counties, the general public noted that methamphetamine use and opioid abuse were top concerns, and over half of healthcare providers indicated that substance use disorder services were lacking in Jackson and Josephine Counties.¹¹ Additionally, the report indicated that mental health and stress among homeless populations was a main concern. Lastly, the report noted that Jackson County also had fewer mental health providers per capita compared to both neighboring Josephine County and the state as a whole, indicating a higher need for mental health services.

⁷ The National Center for Homeless Education, "The McKinney-Vento Definition of Homelessness," <https://nche.ed.gov/mckinney-vento-definition/>.

⁸ Presentation by MPD staff, January 22, 2019.

⁹ The County also covers a portion of the cost of clearing Greenway encampments, totaling about \$1,100 per clean-up.

¹⁰ Medford Police Department Policy Manual, Policy #464: Homeless Persons.

¹¹ 2018 Community Health Assessment of Jackson and Josephine Counties

Because of housing instability, homeless individuals may be less likely to seek regular preventive care and more likely to seek care for non-emergency healthcare needs at hospital emergency rooms. City Fire-Rescue serves as a first responder for health emergencies in the city although Mercy Flights is responsible for 911 transports. Anecdotal reports from Fire-Rescue indicate that homelessness is a significant cost to their department but does not specifically track data on calls involving homeless individuals. Although the City incurs costs related to first responder time, the majority of healthcare costs incurred in the region are to Coordinated Care Organizations (CCOs), hospitals, and the County.

Public Safety

Homelessness also impacts public safety. Fire-Rescue also responds to fires that have been started in homeless encampments on the Greenway. Police and fire officials report several fires in recent years allegedly started from encampments. In response, and as a harm reduction strategy, in 2018 Rogue Retreat began handing out fire suppressants to individuals living in encampments.¹²

Homelessness is also strongly linked to contact with the criminal justice system. According to one estimate, up to 50,000 people enter a homeless shelter directly from jail in the United States every year.¹³ People re-entering the community from incarceration and those with criminal records also face barriers to accessing housing such as stigma or bans on renting to people with certain criminal records. One report concluded that formerly incarcerated individuals were 10 times more likely to experience homelessness than the general public.¹⁴ The report also found that people experiencing homelessness are more likely to be arrested. In 2016, one in six people arrested in Los Angeles were homeless at the time of arrest.¹⁵

MPD estimates that approximately 20% of the homeless individuals they encounter have a criminal record, and this statistic increases to almost 60% when including bench warrants and citations.¹⁶ People experiencing homelessness may be more likely to engage in property crime as a means of survival, such as petty theft. They may also commit “quality of life” crimes resulting from their homeless status, such as loitering or trespassing. While costs are incurred to the City via the MPD, the majority of criminal justice costs are incurred by the County, especially any healthcare that is delivered in the jail. Additionally, people experiencing homelessness are at increased risk of being the victim of a crime.

¹² Grippo, Genevieve, “Rogue Retreat Supplying Fire Suppressants to Homeless Living Along Greenway,” KTVL News 10, <https://ktvl.com/news/local/rogue-retreat-supplying-fire-suppressants-to-homeless-living-along-greenway>

¹³ Mitchell, Mindy, “Homelessness and Incarceration Are Intimately Linked. New Federal Funding is Available to Reduce the Harm of Both,” National Alliance to End Homelessness. March 29, 2018. <https://endhomelessness.org/homelessness-incarceration-intimately-linked-new-federal-funding-available-reduce-harm/>.

¹⁴ Misra, Tanvi, “The Homelessness Problem We Don’t Talk About,” *CityLab*, Aug 16, 2018. <https://www.citylab.com/equity/2018/08/the-homelessness-problem-we-dont-talk-about/567481/>.

¹⁵ Ibid.

¹⁶ Presentation on homeless response, Medford Police Department, January 22, 2019.

Business and Tourism

Visible homelessness also affects local business and tourism. According to the Medford Chamber of Commerce, Downtown Medford Association, and other businesses, homelessness is a frequent topic of concern and often cited by tourists and customers as a key factor deterring them from patronizing Medford businesses, parks, and facilities. Several stakeholders expressed major issues with the state of the Greenway, including economic impacts of the reduction in recreational and commuting use of the trail system. According to a report from SOU, local businesses in the region reported that security concerns, litter, loitering, vandalism, theft, and the presence of human waste were among the negative impacts of homelessness.¹⁷ Nearly half of businesses reported that they have paid for additional items such as installing exterior lighting and security cameras, and almost half reported filing a police incident.

The perception that visible homelessness is negatively effecting business and tourism is widespread. While calculating a dollar value for the cost of homelessness on businesses would be difficult, anecdotal evidence from many Medford business owners and residents suggests that it is a serious issue. This recently spurred the City to expand Municipal Code 2017-40 related Civil Exclusion Zones to include part of downtown in response to increased vandalism to public property, graffiti, and garbage.¹⁸ MPD can use the expanded ordinance to prevent individuals who commit offenses (e.g., alcohol violation, assault, failure to control a dog, assault, sexual offense, arson, public urination, and criminal mischief) in violation of the ordinance from entering or remaining on City property or the Downtown District for a period of 90 days. Additionally, the City adopted a shopping cart ordinance in December 2017 because of resident complaints about abandoned shopping carts.¹⁹

Housing and Economic Issues in Region

Although new leadership is increasingly focused on the issue, addressing homelessness is a significant challenge, especially given larger housing and economic challenges. Some of the primary drivers of homelessness include a severe shortage of affordable housing, a lack of existing rental housing supply, increased costs of living coupled with stagnant wage growth, and safety net programs that do not align with resident needs. According to a 2018 SOU School of Business research report on the perceptions and needs of county homeless service providers, 96.8% of providers surveyed agreed that, “Lack of affordable housing is the primary cause of homelessness” and cited low-vacancy rates as a major barrier to helping individuals and families exit homelessness.²⁰

¹⁷ Southern Oregon University School of Business, “Business Perceptions of Homelessness and How Homelessness Effects Business Along the I-5 Corridor in Southern Oregon,” Prepared for Jackson County Continuum of Care and City of Medford, March 19, 2018.

¹⁸ City of Medford Homelessness FAQ page on City website

¹⁹ City of Medford Homelessness FAQ page on City website

²⁰ SOU School of Business, “Homelessness in the Jackson County: Service Providers Perceptions and Needs [sic],” Prepared for Angela Durante Principal Planner Housing and Community Development Division, City of Medford, March 19, 2018.

In the county, renter households earning at or below 80% of the Median Family Income (MFI); or \$42,752, are facing a net deficit of 8,355 affordable rental units.²¹ The chart below illustrates the proportional deficit (or surplus) for each income range.

Figure 3. Jackson County: Shortage of Affordable Housing Units, 2010-2014

Renter Affordability	< 30% MFI	< 50% MFI	< 80% MFI
Renter Households	5,720	11,310	18,110
Affordable Units	2,390	4,450	19,945
Surplus/(Deficit)	(3,330)	(6,860)	1,835

Source: Oregon Housing and Community Services: Jackson County Demographic & Housing Profile

Overall, only 15 affordable units were available per 100 renter households at 30% MFI; 25 units per 100 households at 50% MFI; and 75 per 100 at 80% MFI.²² The most comparable city data can be found in the City’s 2008 Housing Element, which reports a deficit of nearly 4,450 units for households earning under \$25,000, or just under the 50% of the Area Median Income (AMI) in 2008. There was a slight surplus of about 725 units reported for households earning close to 80% AMI.²³

A significant affordable housing shortage across the county has fueled rising median rents in Medford and a rental vacancy rate of 1.64%, which is significantly lower than the average vacancy rate for the state of Oregon (3.8%).²⁴ The average cost of a one-bedroom apartment in the City in January 2019 was \$872²⁵ (2019 Fair Market Rent for 1 bedroom is \$747). The average cost of a two-bedroom apartment as of February 2019 in Medford was \$1,139 (a 21.6% increase from last year).²⁶ This average exceeds HUD’s 2019 Fair Market Rent (FMR) of \$988 by 15.28%.²⁷ Service providers anecdotally report seeing rents as high as \$950 for a one-bedroom.

²¹ Oregon Housing and Community Services: Jackson County Demographic and Housing Profiles. (October 2017).

²² Ibid.

²³ City of Medford 2008 Housing Element. Table 25: Rough Comparison of Housing Affordability and Supply of Dwellings. Sources: 2008 American Community Survey, U.S. Census; HUD Section 8 Income Limits, HUD Fair Market Rent. Based on Oregon Housing & Community Services. Housing Strategies Workbook: You’re Guide to Local Affordable Housing Initiatives, 1993.

²⁴ Department of Numbers, “Medford Oregon Residential Rent and Rental Statistics,” <https://www.deptofnumbers.com/rent/oregon/medford/>

²⁵ Rent Jungle, “Rent Trend Data in Medford, Oregon,” <https://www.rentjungle.com/average-rent-in-medford-or-rent-trends/>

²⁶ Ibid.

²⁷ U.S. Department of Housing and Urban Development FY 2019 Fair Market Rents.

In Medford, 19% of households have incomes at or below the federal poverty level, and the high cost of housing exacerbates the problem.²⁸ The hourly wage needed to afford a two-bedroom at FMR is \$16.58.²⁹ Unfortunately this does not come close to the region’s current minimum wage rate of \$10.75.³⁰

Many county residents are rent burdened. According to the 2018 Community Health Assessment, 56.9% of renter-occupied households spend more than 30% of their income on housing costs.³¹ This percentage is higher than the rest of the state at 52.9% and higher than the national average at 42%. In the city, approximately one-third of renter households are “severely rent burdened,” or spending more than 50% of income on rent.³² The health assessment further indicated that 23% of county households experience “severe housing problems,” defined as having at least one of four severe housing problems that include incomplete kitchen facilities, incomplete plumbing facilities, more than 1.5 persons per room, and cost burden greater than 50%. Consequently, housing is now identified as a key social determinant of health, with being housing unstable or homeless having significant impacts on health and other life outcomes.

Oregon residents who are elderly or have a disability and who are not eligible for Social Security Disability Insurance (SSDI) are eligible for Supplemental Security Income (SSI); however, the federal rate for monthly payments in 2019 is \$771, or \$9,252 annually although the state does offer some case assistance to SSI recipients for certain one-time expenses.³³ These funds are not sufficient to cover rent, food, transportation, and other living expenses, placing the most vulnerable populations at significant risk of housing instability or homelessness.

Eviction rates are another key indicator of housing affordability and stability. In 2016, Jackson County averaged 1.29 evictions per day, a rate that is slightly higher than the rest of the state. Medford averaged just under 1 eviction per day in 2016.³⁴

²⁸ U.S. Census Bureau. 2016 American Community Survey Three-Year Estimates.

<https://www.census.gov/programs-surveys/acs/>

²⁹ Oregon Housing and Community Services: Jackson County Demographic and Housing Profiles. (October 2017).

³⁰ Beleiciks, Nick and Felicia Bechtoldt, “Oregon Minimum Wage Increases on July 1, 2018,” State of Oregon Employment Department, June 28, 2018. <https://www.qualityinfo.org/-/oregon-s-minimum-wage-to-increase-each-year-through-2022>.

³¹ 2018 Community Health Assessment of Jackson and Josephine Counties, January 2019.

<http://jeffersonregionalhealthalliance.org/wp-content/uploads/2019/01/JRHA-CHA-012419-FINAL.pdf>.

³² US Census Bureau, “Selected Housing Characteristics, 2012-2016 ACS 5-year estimates, Jackson County, Oregon,” <https://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?src=bkmk>.

³³ Oregon Department of Human Services, “Oregon Supplemental Income Program—Medical,” <https://apps.state.or.us/Forms/Served/de9831.pdf>

³⁴ Eviction Lab, Maps, <https://evictionlab.org/>

Potential Impact from In-Migration Patterns

Stakeholders reported that in-migration patterns of homeless Veterans and California residents may have an impact on homelessness. There is some evidence to support this claim.

Homeless Veterans: A 2016 study by researchers at the National VA Center on Homelessness examined homeless Veteran migration patterns across the country by looking at 2011-2012 data from all VA Medical Centers (VAMC). According to the report, the White City VAMC (referred to as the White River, Oregon VAMC in the report and now known as the VA Southern Oregon Residential Rehabilitation Center and Clinics (VA SORCC)) was among the nation's top three VAMCs for highest net gains of homeless Veteran in-migration proportionally to the overall Veteran homeless population. The study, which also considered out-migration, noted that the White City VAMC had a 15% net gain in its homeless Veteran population.³⁵ According to the study, Veterans diagnosed with severe mental illness were more likely to migrate out of their originating region.

This assumption was supported by anecdotal reports from VA SORCC staff that suggested as many as two Veterans arrive daily from other regions.³⁶ Consequently, VA SORCC staff expressed support for a reunification pilot program that could help Veterans return to their home support system. Approximately 327 Veterans are currently reported on the CES By-Name-List; however, it is uncertain how many Veterans might benefit and whether the VA SORCC would have the capacity to administer such a program.³⁷

California Residents: According to a 2012 report by the Center for State and Local Leadership, California was the leading state of domestic out-migration in the nation. IRS data during this same time period ranked Oregon fourth in the nation for in-migration from California.³⁸ Economic adversity and density were revealed as primary drivers of out-migration. In Oregon, \$3.85 billion in former Californian income entered the state between 2000 and 2010. Newcomers from California to Oregon also reported incomes \$4,000 higher than Oregon out-migrants.³⁹ The in-migration of Californians to Oregon has likely increased competition for local housing supply, which can create an advantage for those with higher incomes, leaving those with lower incomes rent burdened and/or living in substandard conditions.

Regional Efforts to Address Homelessness

Over the last decade, the region has engaged in three key efforts to address homelessness, including the creation of the *Jackson County Ten-Year Plan to End Homelessness*, the Jackson County Homeless Task Force (HTF), and the recent restructuring and governance of the CoC.

The *Ten-Year Plan*, which was adopted by the Jackson County Board of Commissioners in June 2009, sought to “reduce the numbers, mitigate the impact, and improve outcomes for people who

³⁵ Metraux, S. PhD, Treglia, D. PhD, and O'Toole, T. MD. (2016). Migration by Veterans Who Received Homeless Services from the Department of Veterans Affairs. *Military Medicine*, 181, 10:1212.

³⁶ VAMC Southern Oregon Rehabilitation Center. (3/18/19). Amanda Doemland, Homeless Program Manager

³⁷ Ibid. Heather Jenard, Case Manager

³⁸ Gray, T. and Scardamalia, R. (2012). The Great California Exodus: A Closer Look Center for State and Local Leadership. https://media4.manhattan-institute.org/pdf/cr_71.pdf

³⁹ Ibid.

experience homelessness” in the region.⁴⁰ Developed through a collaboration among the County, United Way of Jackson County, the HTF, and numerous community partners, the *Ten-Year Plan* contains six discrete strategies to address homelessness:

1. Increase the stock of permanent, affordable, and supportive housing for individuals and families who earn less than or equal to 30% of Area Median Income (AMI).
2. Increase agency coordination and service integration at all levels.
3. Provide case management to help people maintain stable rental housing.
4. Provide financial assistance and life skills training to help people move into stable housing.
5. Develop and increase sustainable emergency and transitional shelter, as well as permanent supportive housing options for youth and other vulnerable populations.
6. Develop an ongoing community campaign that highlights emerging issues in the continuum of homelessness.

In 2018, the CoC shared progress updates on each of the six strategies.⁴¹ According to that report, progress on the *Ten-Year Plan* included: improved operations of the Medford Kelly Shelter, expanded operations of the Ashland Winter Shelter, restructuring the CoC to promote Coordinated Entry and strengthen collaboration among partners, increased outreach and case management for homeless youth and families, and a multimodal community education campaign that included housing summits, art and photography exhibits, and a 24-episode series about homelessness on local television, among other accomplishments.

While the impact of homelessness has been reduced through several of these strategies, the number of individuals and families experiencing homelessness has continued to rise. Stakeholders report the most important unmet strategies are the need for a low-barrier, year-round emergency shelter, transitional shelter, permanent supportive housing, and the development of more housing units for persons earning less than 30% Area Median Income (AMI). According to the CoC Manager, the majority of the affordable housing built in the past nine years was developed for individuals and families earning 50-60% AMI.

Continuum of Care

Across the United States, continuums of care are tasked by HUD to implement the requirements of the Homeless Emergency Assistance and Rapid Transition to Housing (HEARTH) Act and later the 2012 CoC Program Interim Rule expanded the role and duties of the CoC.

The HTF historically has functioned as the local advocacy and service coordination body for the region. The HTF was primarily composed of nonprofit organizations that received federal funds through HUD CoC and Emergency Solutions Grants (ESG) programs. This body still exists as a work

⁴⁰ Jackson County, *10-Year Plan to End Homelessness*, June 2009. <https://www.accesshelps.org/wp-content/uploads/2014/01/JC-Ten-Year-Plan-2009.pdf>

⁴¹ “10-Year Plan to End Homelessness in Jackson County—Progress Highlights on the Six Strategies: 2009-2018,” https://www.accesshelps.org/wp-content/uploads/2018/09/10-Year-Plan-to-End-Homelessness-Highlights-CoC-Board-Presentation-_allcare-additions.pdf

group of the CoC; however, the role and responsibilities of the CoC shifted and increased with new requirements following enactment of the 2009 HEARTH Act and the 2012 CoC Program Interim Rule.

To meet federal HUD CoC requirements, in 2017 the community began restructuring the CoC and seated a new board (See Appendix D for 2019 CoC Organizational Chart). Currently, the Jackson County Community Services Consortium serves as the fiscal sponsor for the CoC, which acts as the collaborative applicant for the annual HUD CoC Notice of Funding Availability (NOFA) process and ACCESS is the lead agency on the application. The CoC now has a 27-member interagency, cross-divisional board along with an Executive Committee and 12 standing workgroups.

The CoC Manager reported that, in its first year of operations, the CoC has achieved the following:⁴²

- Engaged community-wide participation in its workgroups and programs, involving over 200 people representing more than 100 community entities
- Created a Coordinated Entry System (CES)
- Received HUD funding for a bonus project for the first time
- Provided funding for four housing programs through the HUD Collaborative Application
- Increased Homeless Management Information System (HMIS) participation by more than 150%;
- Expanded outreach into more rural areas of the county for its PIT Count; and,
- Served 850 homeless or at-risk individuals at the Project Community Connect event.

Two additional outcomes CoC staff highlight include the creation of a Regional Emergency Shelter planning group and the development of a Community Resource Center for individuals exiting the local jail and those on parole and probation living at the Transition Center. The Community Resource Center offers services such as photo identification, vulnerability assessments and entry into CES, addiction recovery services, job skill trainings, mental health services, and enrollment in benefits such as the Oregon Health Plan. The Regional Emergency Shelter planning group includes more than 30 community organizations supporting the creation of an emergency shelter, which CoC staff report may be operational by the fall of 2019.

Although the newly structured CoC has only been in operation for a little over a year, the involvement of cross-sector leadership creates the potential for the CoC to serve as a catalyst to move real systems change to end homelessness in Jackson County. Partners can leverage the successes of the HTF and the reported progress on the *Ten-Year Plan* to continue addressing homelessness. The goals and strategies outlined by the *Ten-Year Plan* and the actions of the HTF continue to be relevant guideposts in the development of this Action Plan.

City Efforts

The City has engaged in numerous activities to address housing needs and homelessness within the city and region, including investing just under \$4 million in housing projects and public service programs in FYs 14-15 through 18-19. Slightly more than half of this investment funded activities such

⁴² Information provided via email by Constance Wilkerson, CoC Manager, March 25, 2019.

as land acquisition for transitional and permanent affordable housing, infrastructure support for new development of affordable rental units, rehabilitation of existing rental and owner-occupied housing, and planning activities to increase housing development and address homelessness. The remaining investments funded activities such as rental supports, homeless youth shelter services, outreach to homeless youth and families, legal services, addictions recovery, domestic violence, and mental health public facility support.

The City has also actively contributed to the restructuring and governance of the CoC. The City expresses a desire to continue to contribute to a new collaborative culture of addressing homelessness and housing development in the region. City staff identified the following examples of local efforts to support housing development and homeless services and housing over the last two years:⁴³

Housing Development:

- Piloted a pre-development project with the Housing Authority of Jackson County to address regulatory barriers induced by HUD’s environmental review requirements.
- Invested approximately \$90,000 in grant funds to research housing strategies and to provide targeted policy and incentive advice to City Council to increase development of housing at all price points.
- Hosted a “pop-up” event to educate and attract developers to Medford; event included City Council, leadership staff, and 11 community partners.
- Leased City-owned land for the development of Hope Village, and later increased the permissible units from 14 to 30.
- Awarded Habitat for Humanity just under \$950,000 for the acquisition/rehabilitation of five blighted/foreclosed properties for development/redevelopment of seven new homeownership opportunities.
- Completed a cross-sector pilot project to rehabilitate a blighted single-family home into recovery housing for three households. A private developer acquired the property, the City and ACCESS leveraged federal and state funds for rehabilitation, and First Presbyterian Church rents the unit. There is also an ADU that houses a low-income tenant receiving rental assistance from ACCESS.
- Funded infrastructure support for the development of 115 new affordable rental units through HAJC.
- Piloted the use of a City staff liaison to facilitate communication between housing developers and City departments during the application and permitting process.
- Adopted three economic incentive strategies including the appointment of a permanent Housing Advisory Commission to administer all housing-related City resources and advise Council on housing policy; adoption of a Construction Excise Tax (CET) program; and System Development Charge (SDC) Deferral or Exemption program to incentivize development of affordable housing.
- Appointed a Community Development Grants Commission to strategically administer the City’s CDBG and GFG programs.

⁴³ Information provided via email by Angela Durante, Principal Planner, City of Medford Housing and Community Development Division, March 25, 2019.

- Implemented six regulatory housing strategies that create opportunity for increased density, expand permitting for ADUs, streamline minor lot partitions, modify zone change locational criteria and density calculation, allow Residential Care Facilities of over 15 residents in Multi-family Residential zones, and allow conversion of Single Family Residential in commercial zones to easily convert between residential and commercial uses.
- Completed a 20-year effort to expand the Medford Urban Growth Boundary (UGB), adding approximately 4,046 acres, increasing available land for residential and employment-related development by roughly 1,658 acres.

Homeless Services and Housing

- Approved a safe parking ordinance giving religious institutions the option to allow homeless individuals and families to park and sleep overnight in church parking lots.
- Funded the acquisition of a combined transitional housing/vocational training facility for homeless and at-risk youth through Youth 71Five Ministries.
- Prioritized permanent supportive housing during the CDBG PY17-18 and HMIS in 18-19.
- Engaged Mercy’s Gate Rogue Valley to discuss opinions, priorities, strategies, and methods of addressing homelessness with faith-based partners, in addition to identifying potential gaps and redundancies in services provided by faith-based groups.
- Coordinated with the SOU School of Business to complete consulting projects that informed the City of the community’s perceptions and attitudes surrounding the homeless population.
- Approved an ordinance to allow for 90-day temporary shelters in all zones with a Conditional Use Permit.

Other Efforts

Numerous other governmental and community-based entities have contributed to the recent efforts to address homelessness in Medford and across the region. Some of these efforts are reflected above in the description of City and CoC activities. However, full detail on activities across all organizations was not available for this report. According to City staff, some of the key partners engaging in recent efforts to address homelessness include: the Housing Authority of Jackson County, Community Care Organizations, the VA SORCC, ACCESS, and faith-based groups.

Jackson County Department of Mental Health is also engaged in efforts such as investing over \$1 million in programs and resources that address homelessness in FY14-15 through 18-19.⁴⁴ Investments fund activities including rental supports, short-term motel stays, transitional housing, development of adult foster homes for people with physical disabilities, peer-based programs, outreach to homeless youth and families, and mental health services.

⁴⁴ “Jackson County: Investments that assist in address and reducing homelessness,” provided by Stacy Brubaker, Division Manager, Jackson County Department of Mental Health, Jan 22, 2019.

According to CoC staff, the County is also currently engaging in a Sequential Intercept Mapping (SIM)⁴⁵ process to identify the various pathways by which people with Serious Mental Illness come into contact with and move through the criminal justice system. SIM maps include access and assessment points, as well as diversion and re-entry systems, which can include connectivity to the homeless services system in a county. Jackson County is also proposing opening a new jail that will include better services and programming to transition previously incarcerated individuals successfully back into the community, including significant investment in mental health and substance use disorder treatment.⁴⁶

Coordinated Entry and System Performance Data

While PIT Count data can help identify how many total persons are experiencing homelessness on a given night, PIT data generally do not provide a full picture of how many households may experience homelessness annually in the region.⁴⁷ Data from the region's CES can better help identify the overall need and what housing interventions will be needed to meet the demand.⁴⁸

As of February 2019, a total of 2,081 households was on the active CES list countywide. Of those, 429 were Veteran households (410 single adult households and 19 families) and 1,652 non-Veteran households (1,465 single adult households and 187 families). CES data tends to more accurately reflect the full scope of ongoing housing and services needs in the region than annual PIT Count data, because it reflects all households seeking services or contacting the homeless services system, not just a one-night snapshot.

As part of CES, households are assessed using a standardized tool called the Vulnerability Index – Service Prioritization Decision Assistance Tool (VI-SPDAT) and their score indicates the type of housing intervention that will best meet their needs. The CoC's assessment tool recommends households for three interventions based on their needs:

- **Self-Resolve/No Services:** Those with lower identified needs are scored as “Self-Resolve” or “No Services.” These households are assumed to be able to end their homelessness on their own without a dedicated housing intervention. Households still may need a short stay in a temporary housing program such as a shelter and other social services but will not require a more intense housing intervention.
- **Rapid Re-Housing (RRH):** Households with moderate needs are recommended for RRH, a short- to medium-term rental assistance program combined with wraparound service

⁴⁵ Policy Research Associates, “The Sequential Intercept Model: Advancing Community-Based Solutions for Justice-Involved people with Mental and Substance Use Disorders,” <https://www.prainc.com/wp-content/uploads/2018/06/PRA-SIM-Letter-Paper-2018.pdf>.

⁴⁶ Letter from Jackson County Sheriff Nathan Sickler, “Proposal for New Jail Project,” March 21, 2019. <https://jacksoncountyor.org/sheriff/News/boc-hears-proposal-for-new-jail-project>.

⁴⁷ Roman, Nan, “Why the PIT Count Counts,” National Alliance to End Homelessness, January 16, 2019. <https://endhomelessness.org/pit-count-counts/>.

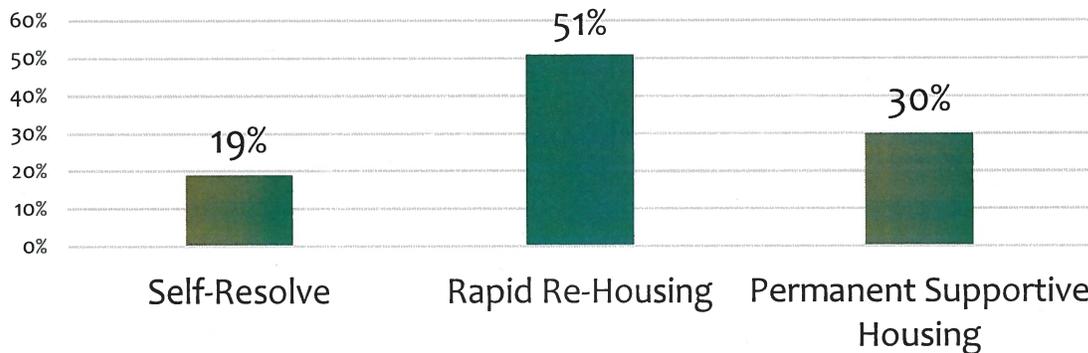
⁴⁸ CES is the system process to assess all households experiencing homelessness to identify their needs and refer to the most appropriate housing and services intervention. It is mandated by the U.S. Department of Housing and Urban Development (HUD) for all Continuums of Care across the Country. In Jackson County, ACCESS is the CoC lead responsible for implementing CES.

supports to assist households with increasing their incomes to eventually take over rent payments on their own.

- **Permanent Supportive Housing (PSH):** Households with significant needs are recommended for PSH, a long-term, indefinite housing subsidy program combined with intense wraparound services including case management.

Figure 4 displays the recommended housing interventions for households currently seeking assistance in Jackson County through CES. This includes all households both Veteran- and non-Veteran categories, as well as single adults and families. See Appendix E for CES data by subpopulations.

Figure 4. CoC Coordinated Entry System Recommended Housing Interventions



In addition, the CoC's System Performance Measures (SPM) can help to identify needs, flow through the system, and successful exits from the homeless system. In recent years, HUD has shifted its focus to evaluating the performance of the entire community in addressing homelessness rather than individual projects. CoC's are not rated against each other; but rather, each CoC is compared to itself year over year. HUD created seven SPMs by which every CoC across the country is measured. In addition, all programs in any given CoC—regardless if they receive HUD funding or not—are included in the community's measures. These measures include:

1. Length of Time Persons Remain Homeless
2. Extent to which Persons who Exit Homelessness to Permanent Housing Destinations Return to Homelessness
3. Number of Homeless Persons
4. Employment and Income Growth for Homeless Persons in CoC Program-funded Projects
5. Number of Persons who Become Homeless for the First Time
6. Homeless Prevention and Housing Placement of Persons Defined by Category 3 of HUD's Homeless Definition in CoC Program-funded Projects
7. Successful Placement from Street Outreach and Successful Placement in or Retention of Permanent Housing.

When looking at the most recent Medford, Ashland/Jackson County CoC SPM report from FY 2017, key data over the course of 12 months include:

- 881 persons were served in some form of temporary shelter program (emergency shelter and transitional housing) with an average stay of 92 days in shelter (median of 107 days).
- For those who exited successfully to permanent housing from all programs (emergency shelter, transitional housing, RRH, and PSH) only 3% returned to homelessness in 12 months and 11% returned to homelessness within two years.
- 720 persons who entered any temporary housing program were considered homeless for the first time.
- Out of all persons who exited temporary housing (emergency shelter and transitional housing) and RRH programs, 37% exited successfully to permanent housing.

It should be noted that these data are gathered from the region's HMIS. In general, HMIS systems tend to have low participation rates and data quality may not be fully representative of all outcomes in a community. However, the above data is what the CoC has submitted to HUD and is one of the primary factors that impact regional funding. HUD has stated that SPMs will increasingly be given more weight in future federal funding decisions.⁴⁹

Resources to Address Homelessness

Equally important to understanding the needs of those experiencing homelessness is understanding what resources are available to meet those needs.

Resources Available to the City to Address Homelessness

The City's available resources to address housing and homelessness include:

1. Annual federal entitlement funds through HUD's Community Development Block Grant program
2. Biennial funding for direct public services through the City's General Fund Grant program
3. Newly established Construction Excise Tax revenue dedicated to affordable housing development and programs
4. State Neighborhood Stabilization Program funds
5. Staff resources to build community capacity and implement policy change
6. Medford Urban Renewal Agency project funding
7. Resources leveraged through other community agencies; and
8. Other grant opportunities, as available.

Each resource is described below. Funding amounts listed reflect the most recent five-year period of 2014/15 – 2018/19.

Community Development Block Grant (CDBG) Program: The City has received annual entitlement CDBG funds since 1989. Over the past five years, the average annual funding was \$775,573.⁵⁰ HUD

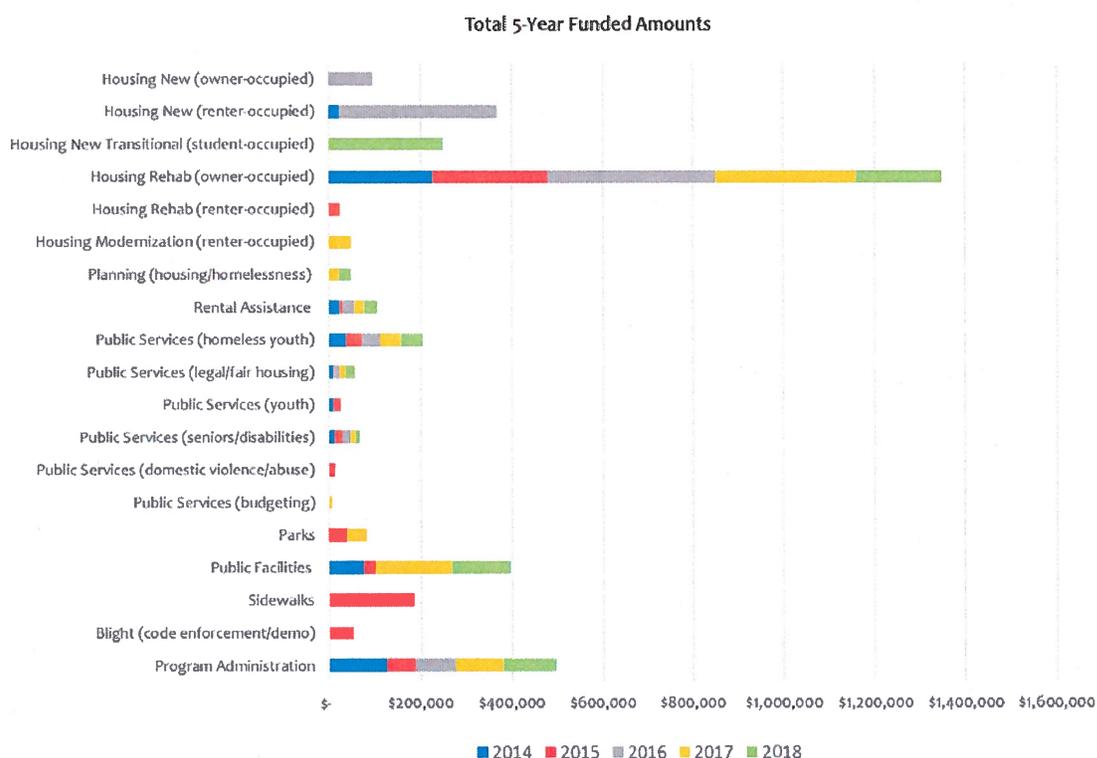
⁴⁹ HUD Exchange, "SNAP's Data Strategy," May 5, 2017. <https://www.hudexchange.info/news/snaps-data-strategy/>

⁵⁰ City of Medford Housing and Community Development Division. 2014-2018 CDBG Funding Analysis.

limits funding public service programs to 15% of the total annual entitlement and administration of the CDBG program to 20%. Historically, the City has always awarded the allowable 15% to public service programs.

CDBG funds are awarded on an annual competitive basis. City Council appoints the Community Development Grants Commission to administer the annual grant competition and make recommendations to Council for final approval. Figure 5 summarizes how CDBG resources have been distributed over the past five years.

Figure 5. City of Medford CDBG Program 5-Year Funded Amounts by Activity Type

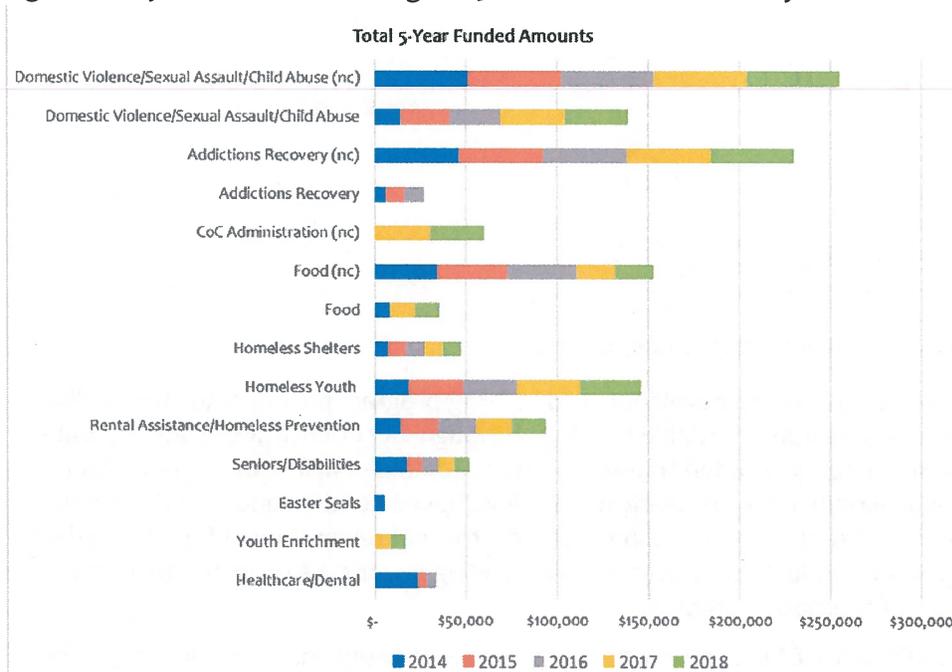


Source: City of Medford Housing and Community Development Division CDBG funding analysis, 2014-2018.

Rehabilitation of existing housing was allocated the most funds at just over \$1.4 million, or 36.70% of the total available resources. A long-time owner-occupied emergency homeowner repair program accounted for 95% of this total allocation. Development of new units through acquisition and public infrastructure collectively received \$713,729 or 18.41%, with the majority allocated to the development of 64 units of affordable housing through the Housing Authority and 11 units of transitional student housing through Youth 71 Five Ministries. Rental assistance received 2.7% of total funding and other homeless services received 6.77%. The City anticipates level CDBG funding during the 2019-2021 biennium.

City General Fund Grant (GFG) Program: Since 1997, City Council has granted over \$5.5 million to nonprofit agencies that provide essential public services to Medford residents.⁵¹ These funds are awarded through a biennial competition similar to the CDBG program. Historically, the advising body was an ad hoc committee comprised of three members from Council and three from the Budget Committee. However, in October 2018, Council appointed the Community Development Grants Commission to administer both the GFG and CDBG programs to strategically allocate City resources. Over the past five years, the GFG provided just under \$1.3 million in funding with \$813,766 awarded non-competitively to four programs and the remaining \$481,991 through a competitive request for proposal. Figure 6 summarizes the five-year funded amounts by public service program type, including non-competitive and competitive awards.

Figure 6. City of Medford GFG Program 5-Year Funded Amounts by Public Service Program Type



Source: City of Medford Housing and Community Development Division GFG funding analysis, 2014-2018.

The City Manager is recommending a 55.04% increase to the GFG program in the next biennium. If approved by the Budget Committee and Council, this would increase the annual GFG program to \$429,650.

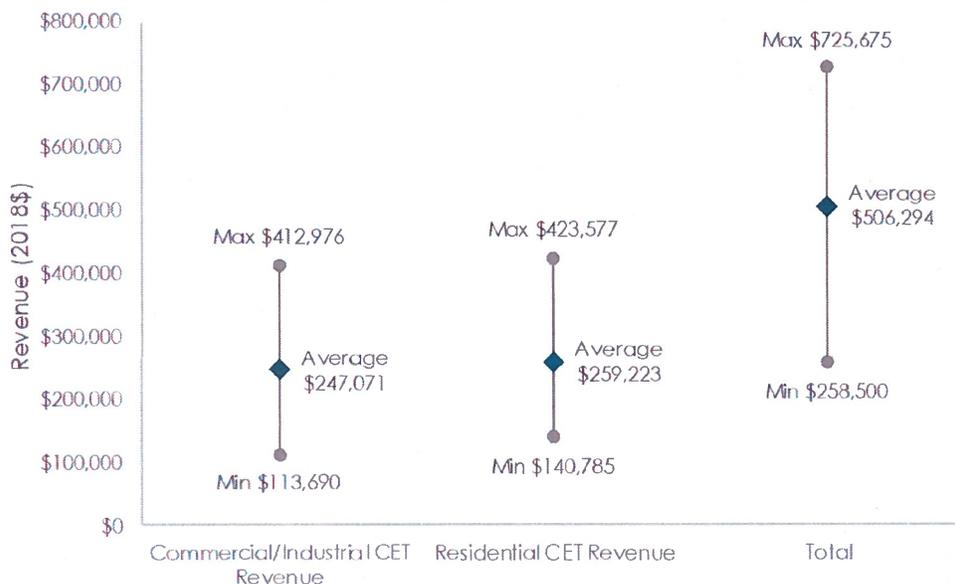
Construction Excise Tax (CET) Program: Revenues generated from the newly adopted CET program will provide the City with roughly \$500,000 per year from residential, commercial, and industrial building permit valuations. This estimate is based on a study completed by ECONorthwest using 10-year building permit values.⁵² However, the City has decided to front-load this program with a

⁵¹ City of Medford City Manager’s Office. 2019-21 General Fund Grants Budget Issue Summary.

⁵² ECONorthwest. City of Medford 2018 Construction Excise Tax Revenue Estimates and Administration.

\$1 million investment in July 2019 to streamline the program’s impact. Figure 7 shows the hypothetical minimum, maximum, and average potential CET revenue based on historical data.

Figure 7: Historical CET Revenue Potential by Source, 2007/08 – 2017/18



Source: ECONorthwest analysis of City of Medford building permit data.

CET funds may be loaned or granted to developers and housing program providers to specifically and exclusively support development of affordable housing. Although City Council awaits administrative recommendations from the newly adopted Housing Advisory Commission, it is anticipated that net revenue from residential permits would be dedicated to developer incentives and affordable housing programs at or below 80% of AMI and that commercial/industrial net revenue would fund affordable housing-related programs or projects up to 120% of AMI. Funding awards are expected to align with the annual CDBG request for proposal process.

Combined, the CDBG, GFG, and CET programs offer the City an estimated annual funding of just over \$1.6 million to invest in programs and projects that seek to accomplish Council’s goals and objectives around housing and homelessness. Close consideration of strategies that could increase the City’s investment is warranted. A few examples might include using loans rather than grants to increase sustainable future impact, minimizing duplication of public service program funding, and continuing to explore developer incentives and housing policy amendments to leverage the resources available through these three programs.

Neighborhood Stabilization Program (NSP) Funds: The City occasionally receives program income from the payoff of NSP liens on housing projects that were originally funded for acquisition, rehabilitation, or down-payment assistance. Funds are passed through Oregon Housing and Community Services (OHCS) to mitigate foreclosures after the Great Recession. The original grant of just over \$2.2 million, converted 41 homes to restricted affordable; 23 owner-occupied units and 18 rentals. Since 2014, the City has received \$236,000 in program income to be reinvested. On occasion, OHCS also announces the availability of additional pooled funding from the state.

The City secured just over \$720,000 from this pool in 2018 to acquire and rehab three additional foreclosed homes for home ownership.⁵³

City Staff Resources: Calculating available City resources relating to planning, public health, safety, and recreation are difficult to estimate and often come with no option for cost recovery. A good example is the recent estimate provided by the City Manager and Housing and Community Development Division Planner who estimate 10% and 50% of their total hours are dedicated to homelessness, respectively. Additional Planning Department staff resources to research and implement developer incentives and housing policy amendments.

Other departments expending resources include MPD, Parks and Recreation, and Fire-Rescue. Resources are allocated to encampment clean-ups, crime activity and fire protection along the Greenway, clearing trash and excrement from parks, and providing first responder care to homeless individuals. MPD and Parks and Recreation collectively estimate annual expenditures of \$173,000 on the Greenway alone. MPD and Parks and Recreation staff clearly expressed the need for additional resources to address homeless activity on the Greenway and in the city's parks. Scarcity of resources may stimulate partnerships to raise funds and volunteer hours to improve safety and public use of the Greenway and create job training programs for homeless individuals.

Medford Urban Renewal Agency (MURA) Program: In 2018, City Council approved the extension of urban renewal activities and authorized approximately \$20 million of additional tax increment funding through 2024. Ninety percent of that funding is currently allocated for improvement in Liberty Park north of Jackson Street, an area that has a high concentration of predominantly naturally occurring, affordable rental housing and offers significant potential for infill affordable and workforce housing development. Project selection is pending the completion of an updated neighborhood plan and identification of improvement strategies appropriate to the statutory purposes of urban renewal, including housing.

Strengthening the neighborhood through conservation of existing housing stock and infill development are key strategies under consideration, along with improved accessibility and connections to Downtown and surrounding areas where employment and services are located. Rather than bonding against future tax increment revenues at the outset, implementation of MURA funding is anticipated on a pay-as-you-go basis that will allow incremental development over the coming 5-6 years. Additionally, City Council has directed City and MURA staff to investigate potential new urban renewal districts elsewhere within the City. The current work in Liberty Park will help inform that investigation and awareness of the role urban renewal can play in addressing the community's housing needs going forward.

Other Community Resources

Significant resources can be cultivated through collaboration with other community agencies. Larger more independent funding partners include, but may not be limited to the County, Housing Authority, and ACCESS. However, other nonprofits and agencies from the healthcare, faith-based,

⁵³ City of Medford Housing and Community Development Division. 2008-2019 NSP Funding Analysis.

and private business sectors should be further evaluated to develop a more inclusive accounting of available resources across the region.

Below are summaries of other resources available in the community. Although this list is not fully-inclusive of the ad hoc and informal resources often provided by churches or volunteers, review of available resources can inform a more formal regional “funders collaborative.”

- A report from Jackson County estimates the County’s investments to address and reduce homelessness during FY14-15 through FY 18-19 at just under \$1.1 million. Approximately 46.3% or \$500,000 of the total investment funded the initial set-up of Compass House, the first accredited Clubhouse Model in the state of Oregon. The second largest amount of \$124,789 or 11.6% assisted Maslow Project’s homeless youth and families outreach program. The third largest award of \$115,000, or 10.7%, funded Columbia Care Services’ rental assistance program. The remaining \$339,978 or 31.4% went to other rental assistance programs, adult foster home care, transitional housing beds, and a peer-based mental health crisis program known as the “Living Room.”⁵⁴ The County’s report did not reflect behavioral health services, child welfare services, probation, and other resources that are not specifically dedicated to homelessness but that help homeless households. The County has also mentioned the creation of a new jail that will help address homelessness. It is yet to be determined if a new jail is necessary; however, it should not be held up as a positive solution to address homelessness. In fact, providing services to homeless individuals in jail settings is probably one of the most expensive approaches, and funds would be better spent on providing community-based services so that individuals experiencing homelessness do not end up in the criminal justice system.
- The Housing Authority and ACCESS receive federal and state funding to develop housing that is affordable to low- and extremely low-income households and to administer a variety of programs that make housing more affordable and attainable for renters and aspiring homebuyers. The Housing Authority serves the region with about 1,800 HUD Housing Choice vouchers that homeless households can qualify for, as well as 300 HUD Veteran Affairs Supportive Housing (VASH) vouchers for Veterans. The Housing Authority also currently serves the Rogue Valley with 1,500 units and continues to be successful at securing multifamily housing finance grants and tax credits through OHCS.⁵⁵ ACCESS is a certified HUD Housing Counseling Agency and an Oregon Regional Housing Center, which allows them to contribute significant resources toward home ownership. Other resources are targeted to housing stability, rental assistance, affordable housing development, and support services for Veterans, seniors, and people with disabilities. ACCESS also provides approximately \$600,000 for regional homeless shelter options.⁵⁶ Both agencies offer significant partnership opportunities to help the City achieve the goals outlined in this plan.

⁵⁴ Jackson County. Summary of Investments to Assist with Addressing and Reducing Homelessness.

⁵⁵ Housing Authority of Jackson County. (1/24/19). Jason Elzy, Executive Director.

⁵⁶ ACCESS. (2/26/19). Pamela Norr, Executive Director.

- The Faith-Based Community is cultivating resources to help plan and implement positive solutions. Churches across the region are willing to open their doors for emergency shelters and parking lots to allow people to sleep safely in their cars. Stakeholder feedback and anecdotal evidence also suggest a rise in volunteerism, financial support, advocacy, and board leadership for local homeless facilities and service programs.
- Many private sector businesses and associations such as the Chamber of Commerce and Downtown Medford Association (DMA) express strong interest in contributing resources to help implement solutions to housing and homelessness. Concerns about the safety and investment in the downtown area, inability to retain employees due to a lack of housing options, lack of skilled workforce, and passion to help homeless Veterans may lend opportunity for pilot workforce housing and job training programs.
- The region’s two primary CCOs—AllCare Health and Jackson Care Connect—work together to provide healthcare services to individuals and families as part of Oregon’s Medicaid Health Plan. Both CCOs have prioritized housing through the development of the most recent Community Health Assessment (CHA), which clearly identifies lack of affordable housing as one of the social determinants of health.⁵⁷ A recent example of CCO investment in homelessness services is their contribution to Rogue Retreat’s Hope Village tuff sheds. Both CCOs have expressed a desire to partner a pilot project that could acquire and convert an existing home to transitional housing for medically fragile individuals discharged from hospitals. Many of these individuals have nowhere to stabilize before entering a shelter or securing alternative housing arrangements. CCOs’ resources are most effectively allocated to providing homeless residents with medical care.
- The White City Veteran’s Administration (VA) receives National Special Purpose funding that is passed through the Southern Oregon Rehabilitation Center and Clinics (SORCC) to operate a 255-bed residential treatment center for substance use disorders and mental illness. As reported by SORCC staff, 327 homeless Veterans were on the CES By-Name-List in March 2019. Resources are available to help dual-diagnosed Veterans exit SORCC programs to permanent housing in the County or back to their home support systems. As mentioned previously, Veteran migration patterns could support a sharing of resources to reunite these individuals with support systems available near their homes of origin at discharge. The SORCC is currently challenged at half-staff capacity but expressed interest in developing a pilot program. The SORCC also is responsible for the region’s HUD Veterans Administration Supportive Housing (VASH) program that according to the 2018 HIC had 313 PSH vouchers for homeless Veterans.

Grant Opportunities: Recently, the City Planning Department was awarded a \$40,000 grant from the Oregon Department of Land Conservation and Development (DLCD) to conduct a study on the various financial incentives and development code amendments that could be implemented to address housing availability and affordability. This resource is invaluable as it appears to be laying a foundation for action that can be mirrored across the region.

⁵⁷ Jefferson Health Alliance. 2018 Community Health Assessment of Jackson and Josephine Counties.

The City is also well positioned to seek or support other local, state, and federal grants that may help build development project feasibility, mitigate aging housing stock health and safety issues, and address barriers to housing development. A few current opportunities that may show promise include HUD’s Lead-Based Paint and Hazard Reduction grants; FEMA’s Hazard Mitigation grant for seismic retrofits; and Oregon’s Local Innovation and Fast Tract (LIFT) program for development of multifamily housing, and the Regional Solutions Workforce Initiative that could help launch a pilot project for development of workforce housing.

Continuum of Care Resources

Although leadership and structure have been strengthened by the new CoC governance, funding from federal, state, and local partners is currently inadequate. In 2018, the federal funds through the Jackson County CoC program totaled \$246,953, which was the lowest CoC award in Oregon. Additionally, the Jackson County CoC had the lowest per capita funding in the state. Figure 8 highlights the 2018 HUD CoC awards with total PIT Count figures. CoC staff report HUD encouraged the CoC to file an appeal that resulted in an anticipated additional \$50,000 award.

Figure 8. HUD CoC Funding Per Capita by CoC’s in Oregon

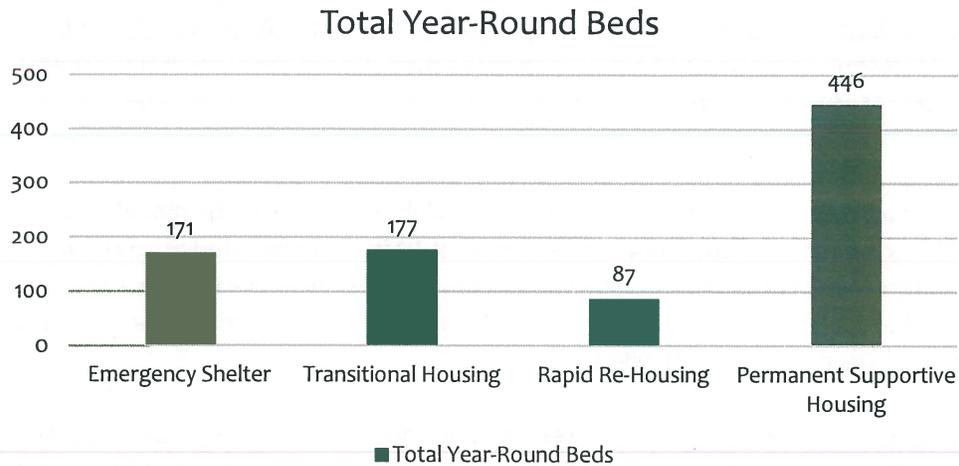
CoC	Total 2018 CoC Funding	Total Persons in 2018 PITC	Average HUD CoC funding per person
Eugene, Springfield/Lane County CoC	\$3,608,512	1,641	\$2,199
Portland, Gresham/Multnomah County CoC	\$24,284,354	4,019	\$6,042
Medford, Ashland/Jackson County CoC	\$246,953	732	\$337
Central Oregon CoC	\$665,492	787	\$845
Oregon Balance of State CoC	\$3,233,919	6,392	\$505
Hillsboro, Beaverton/Washington County CoC	3,853,943	522	\$7,383
Clackamas County CoC	\$2,701,875	383	\$7,055
Totals	\$38,595,048	14,476	

With relatively limited federal funds through the CoC program, the community also relies on other federal, state, and local funds.

Homeless Beds According to HIC

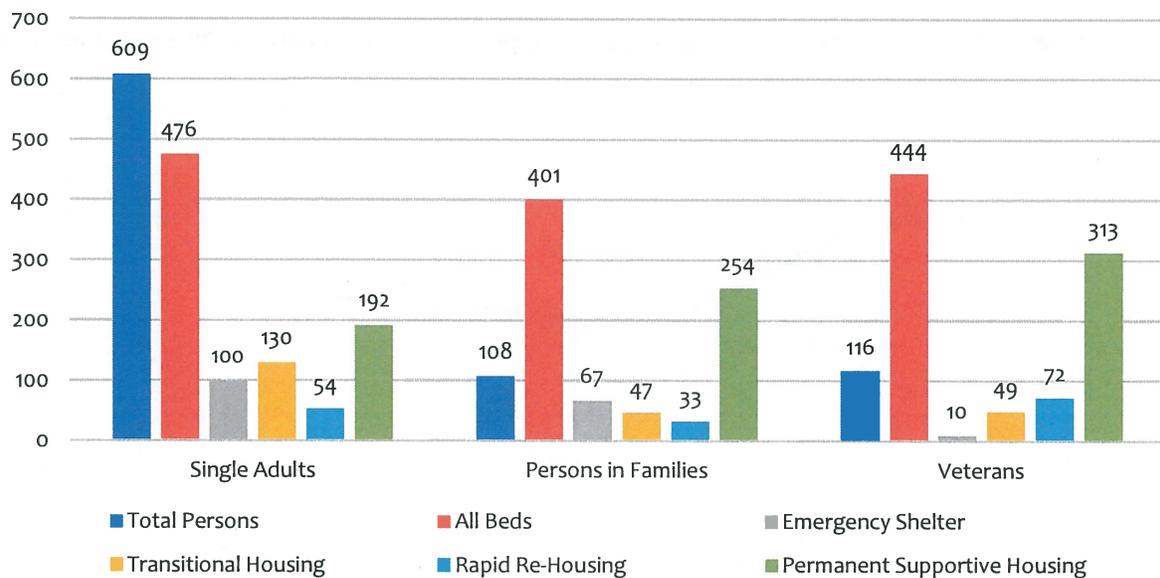
Federal, state, and local funding has resulted in both temporary and permanent dedicated homeless beds within the region. Figure 9 displays the total number of dedicated beds per homeless intervention within the county for FY 2018, as reported in the HIC. These beds include all beds in the County, not just those funded by HUD or other public funds. Although the HIC is considered to be the community’s most comprehensive report of homeless dedicated beds, these numbers may not fully reflect the total number of beds in the region.

Figure 9. Total Dedicated Year-Round Homeless Beds as Reported in the HIC



Although the County has a fair amount of dedicated homeless beds given the total size of the homeless population, many of these beds are dedicated to specific sub-populations. Figure 10 breaks down the above bed types by sub-population.

Figure 10. Populations Experiencing Homelessness vs. Bed Inventory



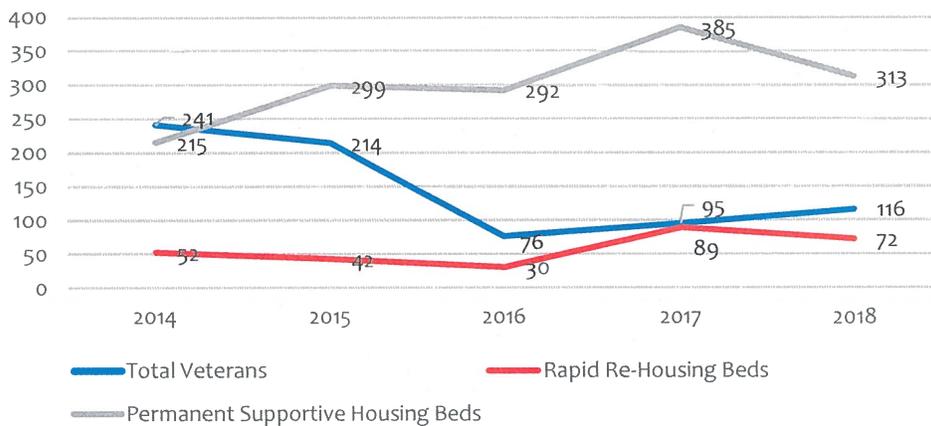
The above chart uses data from the 2018 PIT and HIC as reported from the CoC to HUD. The data for Veterans above is duplicated and included in figures for both single adults and persons in families. As shown in the above chart, single adults are the largest population and have the fewest number of total beds compared to need. Both families and Veterans appear to have more total beds on any given night than the population.

The majority of permanent housing resources—RRH and PSH—are dedicated to Veterans. Of the total 87 RRH beds for both adults and families, 83% are dedicated to Veterans and 70% of all PSH beds in the county are also dedicated to Veterans. This is very meaningful when looking at PSH, especially for single adults. If PSH resources dedicated to Veterans are excluded from the total PSH for single adults in the region, only 35 total PSH beds are available to non-Veteran single adults in the entire county.

While it appears that an adequate number of total beds are available to families, the mix of resources may not adequately match families’ actual need. For example, RRH is recommended as a primary intervention for homeless families at the national level, yet it is the least available resource for families in the region. If you exclude RRH resources available only to Veteran families, the system has only 12 RRH beds available to non-Veteran families.

The above table identifies that many of the current resources in the community, especially RRH and PSH, are dedicated to Veterans in the form of SSVF and HUD VASH. The increased availability of RRH and PSH resources for this population over the last five years resulted in an overall decrease in Veteran homelessness, as shown in Figure 11. Specifically, the number of Veterans experiencing homelessness decreased (despite a slight increase in recent years) while total RRH and PSH beds for Veterans increased. The example below highlights a strong connection between the availability of dedicated housing and decreased Veteran homelessness. Although this example only applies to Veterans, similar trends are expected among single adults and families experiencing homelessness if adequate resources, especially RRH and PSH, were available to address their needs.

Figure 11. Veterans Experiencing Homelessness and Supply of Dedicated Veteran RRH and PSH Beds



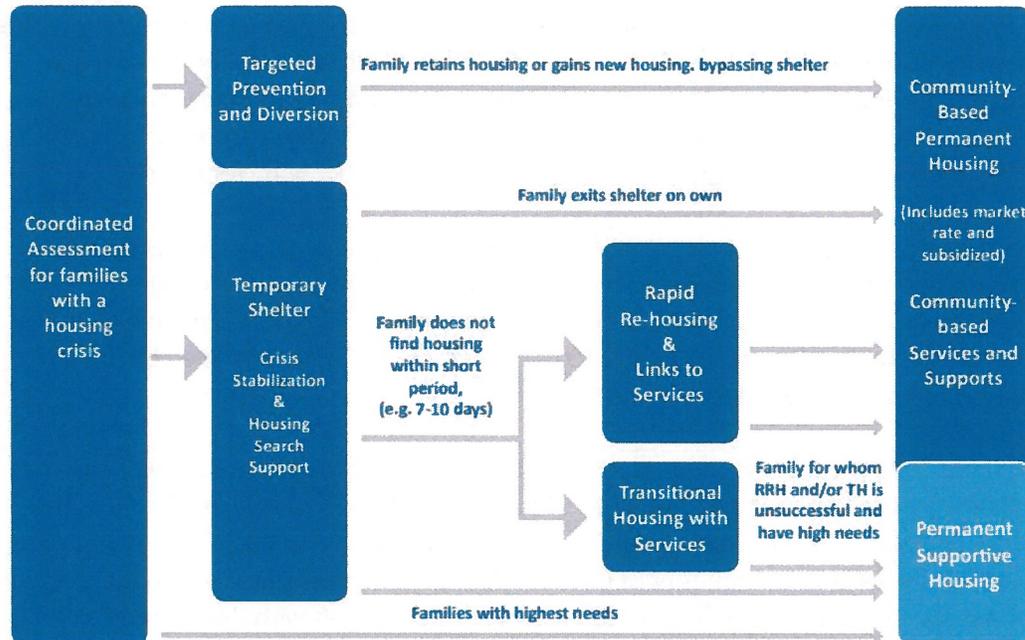
Assessment of Current Homeless Crisis Response System

A homeless crisis response system is the community structure that ensures those who are at-risk of or are experiencing homelessness can quickly access housing and services that best meet their needs. All communities must have a holistic and systematic response to which all leaders, stakeholders, and programs are committed to ensure homelessness is prevented whenever possible and that it is otherwise rare, brief, and non-recurring. Specifically, the system should:

1. Quickly identify and engage people at risk of and experiencing homelessness.
2. Intervene to prevent the loss of housing and divert people from entering the homeless services system.
3. Provide immediate access to shelter and crisis services, without barriers to entry, while permanent, stable housing and appropriate supports are secured.
4. When homelessness does occur, quickly connect people to housing assistance and services, tailored to their unique needs and strengths, to help them achieve and maintain stable housing.¹⁴

Figure 12 highlights the flow of an ideal crisis response system for families according to the USICH.⁵⁸ Although this figure focuses specifically on homeless families, the components of the crisis response system for single adults, including young adults, are similar.

Figure 12. United States Interagency Council on Homelessness - Crisis Response System for Families



⁵⁸ United States Interagency Council on Homelessness (2014) Family Connection: Building Systems to End Family Homelessness

The region, including the City, needs to embrace this model and ensure the necessary and appropriate components are in place to achieve the vision. Many organizations and leaders in the region do embrace this system structure, but others may be resistant to change. The following includes an assessment of the components of the region's primary homeless crisis response system:

1. Leadership, shared vision, and funding
2. Outreach
3. Coordinated entry
4. Diversion and prevention
5. Emergency shelters and interim housing
6. Permanent housing¹⁵

This assessment identifies what is currently in place as well as what may be needed in the region. While the City is not solely responsible for creating or implementing these components, it is a key stakeholder of the larger collaborative within Jackson County, and many of these activities are the responsibility of the CoC, the County, and other partners, with which the City will be actively engaged and committed to supporting.

Leadership, Shared Vision, and Funding

Current Status - Leadership

The newly structured CoC Board is becoming a high-functioning body accelerating the region's response to homelessness. As noted throughout stakeholder interviews, the process of formalizing the CoC Board structure from the initial HTF indicates significant momentum in the community around addressing the issue, shows that decision makers are now around the same table, and has helped grow collaborative efforts. The Board is tasked with ensuring compliance with federally mandated activities for the CoC and can also act as the collective impact body for the region.

The 27-member board has key cross-sector leadership, including representatives from cities, the County, the Housing Authority, homeless services organizations, faith-based communities, healthcare, and those with lived experience of homeless. The Jackson County Community Services Consortium serves as the fiscal agent, while day-to-day duties of the CoC are handled by the CoC Manager and staff who are embedded within ACCESS.

The City has played a significant role within the new CoC structure. The City Manager was the chair of the new board during the first year and continues to participate in board activities. The City also helped fund the CoC Manager position. City staff are represented across multiple CoC workgroups and currently dedicate a significant amount of time to addressing homelessness. Although the City is engaged; several stakeholders indicated that they feel the City struggles with the perception that homeless individuals move to Medford from other areas, creating hesitancy to provide more services in fear of attracting more people. (This misperception was not validated during the completion of this plan and may not be truly representative of City Council.)

The faith-based and business communities have also expressed significant interest in addressing homelessness in the city and the larger region. Many faith-based organizations are providing some level of homeless support or services, such as meal programs or handing out tents. Equally, the Chamber of Commerce and the Downtown Medford Association have been strong voices on the issue in recent years, and express interest in contributing to homeless solutions. Better coordination within these communities, the CoC, and other leaders could leverage resources and increase regional impact.

Several nonprofit homeless services providers offer both direct services and leadership within the region. Throughout the interview process, stakeholders expressed that a lack of resources in the region intensified competition within the service provider community and that some agencies can be “territorial” and “dominate the market.” One stakeholder noted that the Project Community Connect event is a successful example of coordination among service providers, but that the annual event should be expanded and occur more regularly.

Current Status – Shared Vision and Best Practices

Educating leadership and other stakeholders about national best practices for addressing homelessness is also important to align a shared vision across the region. Best practices in addressing homelessness include the person-centered principles of Housing First. HUD and USICH describe Housing First as an approach or philosophy that believes:

1. All people can achieve housing stability in permanent housing with the right supports.
2. Everyone is “Housing Ready.”
3. Improved quality of life, health, mental health, and employment can be achieved through housing.
4. All clients have the right to self-determination, dignity, and respect.
5. The configuration of housing and services should be based on participant’s needs and preferences.⁵⁹

While many organizations in the area expressed awareness of Housing First components such as “low barrier entry criteria” or “harm reduction,” additional education is needed. Several stakeholders discussed that many of the programs available in the city and region are faith-based and may not adhere to most Housing First principles. While these programs fill a need for some clients, the community also needs programs for clients who do not or cannot meet program requirements and need low-barrier options. Other stakeholders mentioned limited “institutional knowledge” of homeless services best practices and potentially a steep learning curve for entities such as law enforcement and elected officials.

Using data to help drive local decision making is considered a best practice when addressing homelessness. Although the use of HMIS is increasing among local programs, the region will need to increase participation in HMIS among all homeless services programs, regardless of funding source, in order to use data effectively for analytics. Increased HMIS participation will encourage the region

⁵⁹ HUD and USICH: Core Principles of Housing First and Rapid Re-Housing Webinar 2014

to build data analysis and interpretation into all levels of discussion across the CoC, and data can help inform local policy and funding decisions.

Current Status – Funding

There is a lack of resources for addressing homelessness in both the city and county. As noted earlier, the CoC receives the lowest per capita funding through the HUD CoC program in the state, and both City and County resources are not currently sufficient to supplement the CoC funding. With limited funding, the region lacks the housing resources, both temporary and permanent, to effectively address homelessness. Additionally, the available funds do not seem to be well coordinated across key public funders. While the City and County maintain lists of projects they fund, they do not currently make collective decisions about the best ways to combine funding to achieve maximum impact.

What is Needed? - Leadership

As the *Ten-Year Plan* ends, regional partners have an opportunity to renew their commitment to a shared vision to guide activity toward achieving regional goals. Some stakeholders expressed a need for the CoC to draft a strategic plan that will guide the Board and workgroups. Other stakeholders indicated the need to pivot from planning to initiating bold action steps. The CoC can increase its efficiency by formalizing roles and responsibilities among board members and partners. Although the CoC and its workgroups have excelled at developing an organization and structure, further delegation of activities will take projects from the planning phase to actionable implementation.

The City should continue to provide a leadership role within the CoC, including dedicating a single agency or staff position to serve as the homelessness lead. Currently, this role is allocated to different departments ad hoc, with the Planning Department handling many of the tasks. The role should be formalized and written into the mission of a City department, as well as in the position descriptions of City staff who will oversee planning and project management of this Action Plan in conjunction with the CoC. The position should have some level of authority and decision making in alignment with City procedures.

Some stakeholders suggest that the City should leverage its position as a convener and play a role in formalizing and strengthening partnerships with faith-based partners, public agencies, and others, as well as in defining a role for businesses, including the Downtown Medford Association and the Chamber of Commerce. The City can also help engage partners such as the education system, foster care organizations, and those with lived experience in CoC activities. The healthcare sector, specifically CCOs, are critical partners that need to be part of the leadership table.

What is Needed? – Best Practices

Evidence-based best practices in addressing homelessness, such as Housing First, harm reduction, trauma-informed care, cultural competency, and others need to be embedded in the development and operation of programs. Implementing best practices, however, can take time. Providers need to be trained, and some may be initially resistant to new methods. Increasing community awareness and education about best practices in homeless services and the evidence-base behind them is critical. Adopting best practices may represent a significant culture change but investing in ongoing

education will help create a culture to ensure there is sufficient buy-in when adopting evidence-based best practices.

The CoC has a Written Standards of Homelessness Assistance as mandated by HUD that guides all service provisions and the use of best practices. The CoC needs to begin training on these standards for all programs in the region, regardless of funding source. The City should incorporate the agreed-upon standards into all homeless services-related City funding opportunities and contract awards.

Data collection and outcomes tracking and building a collective performance-focused culture are other critical areas toward which regional leadership needs to orient. The development and implementation of data tracking tools and performance metrics are essential to understanding how well the homeless system is performing, and key stakeholders should commit to regularly review, analyze, and interpret local data for shared decision making. Data should be incorporated into all CoC Board meetings. Additionally, the CoC should increase its focus on a culture of performance, whereby higher-functioning, higher-performing programs receive more funding. This helps to ensure that funds are invested in high-quality programs, and that funds are efficiently allocated.

What is Needed? – Funding

The region needs to increase resources from federal, state, and local sources. Both the City and County need to direct more local funding to homelessness and specifically toward best practice activities that demonstrate a significant rate of return.

The region should also pursue the creation of a public/private funders' collaborative. A cohesive funders' collaborative made up of partners including the City, County, Housing Authority, ACCESS, CCOs, the United Way, Rogue Valley Council of Governments (RVCOG), Asante, Providence, Chamber of Commerce, local foundations, and other business/private/philanthropic sector funders can align funding priorities locally to supplement HUD resources.

Currently, public and private funders are not coordinating on funding decisions. A funders' collaborative would provide a place for cooperative decision-making, shared discussions about what activities to fund based on regional gaps, and more intentional decision processes when applying for and leveraging other state and federal funds.

Street Outreach

Street outreach is a critical component of the homeless services system. The 2018 PIT Count reported 329 unsheltered persons. MPD estimates, based on their police patrols, that approximately 100-150 homeless individuals live in encampments along the Greenway. Many individuals living outside may be reluctant to enter traditional homeless services, such as shelters, due to mistrust or high barriers to accessing services. The appropriate intervention for individuals who may be unwilling to access homeless services is intensive outreach to build trust and rapport and to support them when they do decide to access housing and services resources.

Current Status

At this time, street outreach programs in the city and county only exist for Veterans and youth ages 18-24. The ACCESS Supportive Services for Veterans Families (SSVF) program and Rogue Valley Veterans Community Outreach program provide outreach services for Veterans while Maslow Project provides outreach services for young adults 18-24. However, the majority of those experiencing homelessness, especially unsheltered homelessness in the city and region are non-Veteran single adults over the age of 24.

MPD is currently the only entity providing outreach support to this group and, while well-intended, is not trained or equipped to take on the role of dedicated street outreach personnel. According to stakeholders, MPD are not necessarily focused on connecting people to housing and services. MPD expressed that they attempt to engage unsheltered individuals but that most individuals are reluctant to accept help. The time needed to truly engage individuals is outside the scope of their role, and best practices do not support using uniformed officers as the only outreach staff in a community. In addition, the current use of MPD for outreach and encampment abatement is a significant cost to the City and other partners. Stakeholders indicated that there is a lack of cohesive and coordinated street outreach programs, and that the annual PIT Count may be the only time to engage those living outside.

What is Needed?

The City and the larger region need to immediately increase street outreach services for populations other than youth and Veterans. New street outreach resources could act as an access point for the local CES to ensure that those who may be hesitant to access homeless programs can still be engaged and put on a path to housing.

The City could develop a partnership with the County, as data indicate that many unsheltered individuals also struggle with behavioral health challenges including mental illness and substance use disorders. The City and County could contract with a nonprofit organization to perform outreach in encampments, along the Greenway, and in other areas where people experiencing unsheltered homelessness congregate. Outreach personnel can leverage the experience of first responders and should closely collaborate with law enforcement and other partners before planned encampment sweeps.

There are examples of business associations or improvement districts dedicating funds to hiring nonprofit social services street outreach staff, rather than security guards, Medford should explore this opportunity for the business sector to partner with the City and County on a mutually beneficial activity.

The City's policy around homeless encampments should also be updated. Currently, according to MPD, the City's response to homeless encampments involves posting a 24-hour notice prior to abatement. Belongings are stored for a certain amount of time and then discarded. Although this process ensures legal compliance, it is not paired with the provision of supportive services and offers to access temporary housing or relocation assistance. The focus and goals of abatement and cleanup efforts should shift to include more outreach, connection to services, and housing placement. The

City's new enhanced encampment policy could serve as a model for other cities in the region and potentially inform a universal, regional policy around addressing homelessness encampments.

The City should pilot an outreach program in partnership with ACCESS and the County to address encampments located along the Greenway. By analyzing CES assessments of the characteristics and needs of encampment residents, the pilot could identify 10-20 high-vulnerability individuals to receive intensive outreach, temporary housing, and permanent housing placement.

Stakeholders also mentioned the need for a drop-in center, safe parking programs, and potentially a safe camping area for those living outside or in automobiles to stay while more long-term permanent housing is arranged.

Coordinated Entry

CES is mandated by HUD, which in 2017 issued guidance on the core components of CES and subsequent requirements including:⁶⁰

1. **Access:** The point at which individuals or families experiencing a housing crisis initially enter the homeless services system. Access points look different in different communities and may be a crisis hotline, drop-in center, or street outreach.
2. **Assessment:** After entry into the homeless services system, providers assess a household's vulnerability, needs, and preferences for housing and other services.
3. **Prioritization:** After assessment, homeless or at-risk households may be ranked by order of risk and need. This allows a community to prioritize those with the highest vulnerability and most-acute needs and helps the CoC effectively manage its inventory of resources.
4. **Referral:** After households are assessed and prioritized, they can be referred to the most-appropriate available service or program to address their needs.

Current Status

The CoC is responsible for oversight, coordination, and development of homelessness-related policies and procedures within Jackson County, including CES. There are various physical locations where homeless households can access the homeless system and receive initial support. Within Medford, the physical access points for specific sub-populations include ACCESS (Single adults, families, and Veterans), Maslow Project (Youth and families), and Community Works (Youth and Domestic Violence/Sexual Assault Survivors). Homeless households can also call 211 or visit 211.org for assistance. As noted previously, the CoC uses a common assessment tool, the VI-SPDAT, which is used to prioritize households for housing using a By-Name-List (Veterans and non-Veterans). These components are in line with national best practices and should be expanded.

The CoC currently has the structure in place for the first three components of CES, including Access, Assessment, and Prioritization. The most significant missing component at this time is Referral—where people go after entering CES. This is mainly a resource issue. Without a supply of resources,

⁶⁰ HUD Notice CPD-17-01: Notice Establishing Additional Requirements for a CoC Centralized Coordinated Assessment System.

including rental assistance, services, and affordable accessible housing, people become “stuck” in CES. One stakeholder expressed that “homeless families and adults get trapped in CES while higher-needs people get access to the limited available services.” Another stated that, “there is no place for people to go after they stabilize” in a temporary housing setting.

What is Needed?

The City needs to support further development and implementation of the region’s CES, for example by creating a dedicated position to oversee CES and providing funds to local nonprofits for carrying out the duties of implementing CES. The City can also engage other partners to assist with funding a position at ACCESS or another organization to serve as the region’s CES coordinator, and the CoC should identify opportunities to support local agencies with implementation activities. The City should consider creating a single location that can serve as a CES access point for all homeless households. The City could also ensure that all contracts with homeless services agencies align with the region’s CES policies and require participation in CES.

The region needs to significantly increase its supply of RRH, PSH, and affordable housing to help increase the flow of people through CES. The region should create a resource map and use CES data for resource planning so that clients progress through the CES system, rather than CES becoming a bottleneck with limited movement out.

Diversion and Prevention

Diversion and prevention are equally important components of the homeless services system as outreach and coordinated entry. Preventing homelessness through services and short-term assistance, as well as quickly diverting individuals and families from the homeless services system when alternate solutions are available, help to reduce the flow of people into homelessness and ensure resources are used for those who truly need them.

Examples of diversion may include: dispute resolution, locating a stable place to stay with friends or family while housing services and supports can be accessed, or assistance with obtaining benefits or other financial or services supports to secure and maintain stable housing. Prevention for households at imminent risk of homelessness may include short-term rental assistance or rent arrears, assistance with utility payments, legal services to prevent eviction, or other supports aimed at keeping individuals and families housed.

Current Status

As noted previously, local data suggest that many households are struggling to maintain their housing and may be on the verge of falling into homelessness. Additionally, vacancy rates are low, which increases competition for housing and disproportionately burdens those in the lowest income brackets, who may not have the financial reserves for security deposits. Other financial- or credit-related barriers may also exist. The effectiveness of existing prevention efforts is unknown, including how well these services may be targeted.

Limited data exists regarding diversion. Although it is a small data set, during the last season of the Kelly Shelter, data showed that 16% of those who entered the shelter were staying in some form of

housed situation the day prior to entry. Also, the CoC SPM's indicated that 720 persons who entered any temporary housing program during a one-year period were recorded as "homeless for the first time." This suggests that people may be entering shelter who, with appropriate diversion assistance, could have been diverted back to their housing situation. Effective diversion would ensure that shelter beds are reserved for those who truly have no other option.

What is Needed?

The CoC, City, and County should work together to examine how funds are currently being allocated for homelessness prevention and emergency rental assistance. The analysis should include information about how households are identified, who is targeted to receive assistance, and outcomes data (i.e., how many families stayed stably housed). Adjustments should then be made to ensure that low-income and struggling households who are most likely to end up homeless are identified and targeted for support. The City, County, and CoC can then pursue opportunities to increase or streamline funding for homelessness prevention to assist these households with maintaining their housing.

Diversion can also be implemented across various programs including outreach and shelter. The CoC should create a Diversion curriculum so that Diversion and housing problem-solving techniques will be embedded in the culture of addressing homelessness across the spectrum of services.

The homeless services system should also increase eviction prevention services, including legal assistance services, to keep eligible households in their rental units. These activities will ensure prevention resources are deployed in the most impactful way possible.

Temporary Housing

Temporary housing takes a variety of forms to address different needs, including low-barrier shelter programs, bridge housing, transitional housing, substance use treatment recovery housing, and safe havens. Every region needs an array of temporary housing options available so that homeless households can be matched to the most appropriate temporary housing accommodation. National best practices promote low-barrier entry criteria and programming to ensure all individuals and families can be successful. Low-barrier entry criteria and programming generally means that programs:

- Do not require individuals to have income to enter the program or pay ongoing.
- Do not require individuals to be clean and sober to enter the program or stay in the program.
- Allow individuals to bring their pets and possessions.
- Do not exclude individuals with criminal justice histories from entering the program.
- Do not require individuals to take medications.
- Do not require individuals to participate in religious activities.
- Identify all services and participation in the program to be voluntary.

Current Status

The city does not currently have a year-round, low-barrier emergency shelter program. However, several temporary housing programs exist within the city. Rogue Retreat also operates a low-barrier shelter program at the First United Methodist Church that provides 50 shelter beds to homeless men

and women during the winter months. Rogue Retreat also operates Hope Village, a 30-bed tuff shed village on City-owned property that provides temporary housing in a community setting. Services at Hope Village include basic showers, restrooms, and meals, as well as case management and referral linkages. Interestingly, the primary funders for Hope Village are the local CCOs. As referenced previously, CCOs are a network of healthcare providers working together to serve Oregonians enrolled in the Oregon Health Plan (Medicaid). CCOs focus on prevention and community-based service provision, thus reducing emergency room visits and increasing long-term health supports and outcomes.

Another example is the Medford Gospel Mission, a 113-bed, 92-week temporary housing and treatment program. The Gospel Mission is designated as a clean and sober environment and requires individuals to commit to the program.

For youth ages 17 and under, Hearts with a Mission offers a transitional housing program in Medford. Hearts with a Mission plans to expand the program to serve young adults ages 18-24. Additionally, the St. Vincent de Paul Family Shelter has 28 beds in Medford but has many rules and requirements that create high barriers to entry.

The City recently adopted an ordinance that would allow homeless households living in their car to park overnight in the parking lots of designated faith-based organizations. Although this is technically not a temporary housing model, it provides an opportunity for those living in their cars, trucks, or RVs to sleep safely and access services so they do not end up on the streets or in shelters and can more quickly return to permanent housing.

What is Needed?

The City should support the creation of a year-round, low-barrier shelter that includes beds for single adults, couples, and families to receive basic resources such as showers, laundry, meals, and a safe, indoor place to sleep. There was a strong consensus that a year-round shelter in the city is desperately needed, and many stakeholders indicated that the Kelly Shelter and the shelter in Ashland could serve as a model. However, operating a year-round emergency shelter is quite costly. A recent news article reported that in Portland to house a family in a homeless shelter if costs \$2,265 per month.⁶¹

The City should also determine if the shelter can act as a single access point for CES, including for diversion services. For many, entering an emergency shelter is the first contact with the homeless services system and a critical opportunity for individuals to complete the VI-SPDAT and be entered in CES. The shelter should also focus on transitioning individuals to suitable permanent housing as quickly as possible and should use data to track progress on housing-related outcomes. The new shelter should work with existing emergency shelters and temporary housing programs in Medford to define its target population and intake criteria. Any new program should also be integrated with

⁶¹ Templeton, Amelia, "How Portland Tried, and Failed, to Provide a Bed for All Its Homeless Children," Oregon Public Broadcasting, March 13, 2018. <https://www.opb.org/news/article/portland-oregon-homeless-children-shelter-families/>

and take referrals from CES. HMIS data for the Kelly Shelter (Appendix I) provides helpful information to understand population needs and appropriate service models.

The City should engage the faith-based and nonprofit communities to consider using existing parking lots for safe parking programs. The City can promote collaborations between the faith-based community and the CoC to raise funds for basic services including restrooms and showers, as well as on-site service links to assist those living in cars to exit to permanent housing.

Permanent Housing

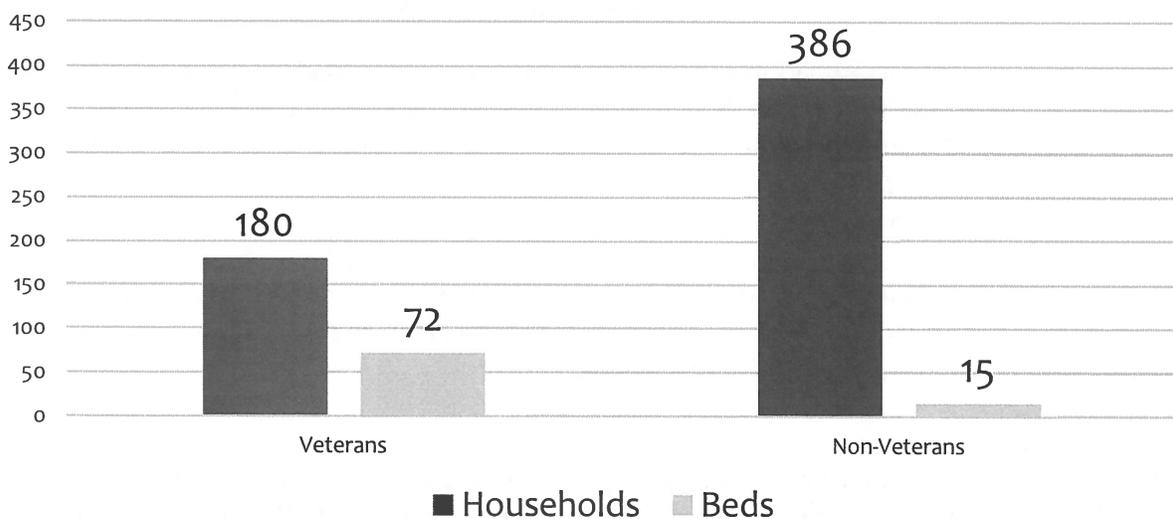
An array of permanent housing options is needed to serve the variety of needs for homeless and at-risk households in the city. These include development of affordable housing, RRH, and PSH for a variety of income brackets at or below AMI.

Current Status

The city and region’s low vacancy rates and affordability issues indicate a substantial lack of affordable housing to serve households in income brackets at or below AMI. Additionally, there is currently no landlord engagement program to provide incentives (e.g., damage funds, holding fees, etc.) for private landlords to rent to subsidized households.

The region also lacks an adequate number of RRH beds and what is available is limited. Most RRH units in the region are designated for Veterans, including 72 funded through the SSVF program. ACCESS also operates 15 RRH beds using HUD ESG funding and other sources. These resources fall below the demand, considering that currently 566 households in the system, most of them non-Veterans, have been identified as needing RRH (Figure 13).

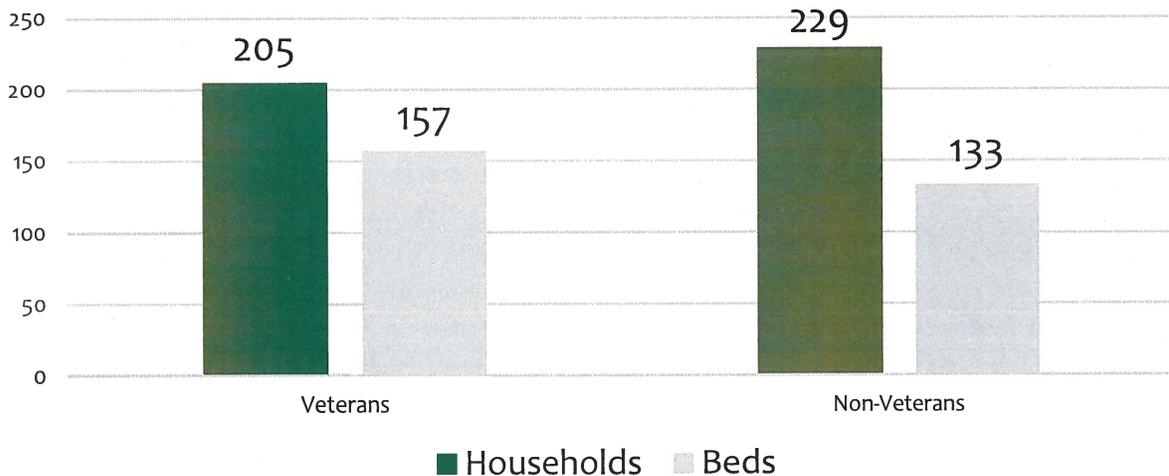
Figure 13. Households Scoring for RRH vs. Bed Inventory



When reviewing the existing data from current RRH programs within the CoC, the success with exiting households successfully transitioning to their own permanent unit after assistance is high. For households who stayed in the program for less than 90 days, 67% exited to permanent housing; while 82% of those who stayed longer than 90 days exited to permanent housing, demonstrating solid housing outcomes. The average length of stay in the program was 269 days, or roughly 9 months (See Appendix F).

With respect to PSH, 54% of the region’s existing stock is dedicated to Veterans through the HUD VASH program. There are very few PSH beds for non-Veterans, and 98 of these beds are reserved for people in families with only 35 beds available for single adults. Additionally, most of the PSH resources are currently filled and new people cannot access these resources until there is turnover. See Figure 14 below and Appendix G for additional detail.

Figure 14. Households Scoring for PSH vs. Bed Inventory



Lastly, there is extreme lack of affordable housing stock in the city and region. This was the largest issue voiced by all stakeholders interviewed, and some stated that there are countless stories of working poor and those on fixed incomes, such as seniors, who are falling into homelessness because of the housing problem.

What is Needed?

Partners in the city and the region need to embrace the concept that homelessness is at its core a housing issue and that there is no way to make meaningful impact on homelessness without addressing larger housing needs in the region.

Increase Rapid Re-Housing

Significantly increasing resources for RRH for non-Veteran single adult households and families should be a high priority. Local data through SSVF has demonstrated that RRH can be extremely successful with placing people into permanent housing. RRH can be increased quickly as it does not require the creation of new physical units and is not a long-term rental assistance model. The cost of

RRH per household and the duration of rental assistance depends on the needs of the person being served. However, RRH assistance is lasting 9 months on average within the county. Based on this, the average cost per household for RRH is \$12,317.

The region should also explore pursuing shared housing or roommate matching models for RRH with single adults so that they are more likely to be able to take on rent responsibility over time. The region should also ensure there are strong partnerships between RRH programs, local workforce development programs, and local businesses to help people increase their incomes.

Because RRH and other tenant-based rental assistance programs such as the HCV program through the Housing Authority rely on the existing rental market for units, a strong regional effort is needed to engage landlords and provide funds to incentivize landlords renting to homeless households using a flexible fund of dollars that could be managed by a single entity. Engaging and educating landlords can increase the likelihood of renting to formerly homeless or at-risk clients. Landlords may be resistant to renting to households with low incomes, poor rental history, a criminal background, or other characteristics. However, many property owners and landlords are willing to work with homeless households if service providers can alleviate some of the concerns and risks.

Engage Landlords

The CoC should launch a regional landlord engagement program that includes landlord outreach and education, as well as financial incentives such as paid security deposits, holding fees, damage mitigation funds, and move-in supplies. The CoC should partner with cities and the County, and especially the Housing Authority, to develop and implement a landlord engagement program throughout the region.

Increase Permanent Supportive Housing

The City and the region need to significantly increase PSH programs and prioritize PSH development primarily for single adults. New PSH development should be distributed equitably throughout the City and not concentrated in only a few areas. The City, County, and Housing Authority need to partner on PSH development via new development or the acquisition/rehab of other properties such as underutilized hotels/motels.

Building new PSH units takes time. In the immediate future, the City, County, and Housing Authority should work together to use tenant-based vouchers for PSH. The Housing Authority could implement a homeless preference in their HCV program and dedicate turnover vouchers to be used as PSH. The City or County could partner with the Housing Authority to fund services that could be paired with those vouchers. The region should also explore partnering with the local hospitals and the CCOs on a PSH pilot that could provide funds for supportive services. Not counting development costs, the average cost of operating PSH (rental subsidies, services, and administrative costs) per unit per year is roughly \$11,358 according to a report presented by the CoC.

Besides creating new PSH programs, the CoC should examine PSH outcomes to improve retention rates and to align prioritization decisions with HUD-funded PSH regulations. When looking at the 2018 data of all PSH programs, 16% of those who entered a PSH program did so from a non-homeless

situation and nearly half did not have any conditions such as mental illness, substance use disorder, or chronic health conditions. There is also a high-turnover rate relative to national models with many clients staying less than a year, and for those who stayed longer than 90 days, only 30% are exiting successfully to other permanent housing locations. This data should be a priority discussion at the CoC Board level. (Appendix G).

Increase Affordable Housing

Most important, the City and the region need to create more affordable housing. Both new construction and rental subsidy strategies should be considered to increase the affordable housing supply. Stakeholders mentioned that the City can create additional financial mechanisms to spur affordable housing development, such as bonds, Tax Increment Financing (TIF), and creation of an urban renewal agency in partnership with the Downtown Medford Association. Many noted that the Construction Excise Tax (CET) is helpful, but not enough to meet the need. Other ideas included leveraging Urban Growth Boundary policies to incentivize more building. Affordable housing development needs to be blended into other development, rather than a “donut” effect as the city grows. The City could continue to increase its role in affordable housing development by lowering fees, making zoning changes, participating directly in construction, and/or working with the Housing Authority to engage more housing developers. The City could also implement an ADU program that waives certain development fees and streamlines the process for homeowners to develop a second unit on a single-family property.

Goals and Actions

The following goals and strategies build off the system assessment information above. Also, many are similar to the goals and strategies in the *Ten-Year Plan*. Although the plan was created 10 years ago, many of the goals remain the same. If homelessness is to be impacted, the City, County, and larger region need to place more urgency on the issues, come together with a shared vision, and implement the goals outlined in the *Ten-Year Plan* and those identified below.

The table below outlines 5 overall goals in order of priority for the City:

1. Increase the Supply of Affordable and Supportive Housing
2. Increase Leadership, Collaboration, and Funding
3. Address Unsheltered Homelessness and Encampments
4. Increase Temporary Housing Programs and Successful Placements
5. Increase Diversion and Prevention Strategies

The following goals are specific to the City, but many are also applicable to the larger regional effort. For the majority of each goal and subsequent actions, the City alone cannot successfully accomplish them and will need to the strong support and buy in from a variety of stakeholders. Each goal and accompanying actions include information on timeframe, potential partners, and role of the City.

Goal #1: Increase the Supply of Affordable and Supportive Housing			
Actions	Role of the City	Timeline	Potential Partners
Action #1.1: Continue implementing Housing Advisory Committee recommendations, through the newly appointed permanent Housing Advisory Commission, including prioritizing affordable housing project review, creating developer incentives, and updating policies and standards to facilitate increased density and allowing for innovative housing models.	Maintain current role within Housing Advisory Commission and ensure recommendations from this Action Plan are incorporated into ongoing Commission recommendations.	<p>Within 6 months: create strategy to continue to implement recommendations.</p> <p>Year 1-2: continuing implementation.</p>	Current members of the Housing Advisory Committee

Goal #1: Increase the Supply of Affordable and Supportive Housing

Actions	Role of the City	Timeline	Potential Partners
<p>Action #1.2: City and County work collaboratively to set annual housing production goals.</p>	Reach out to appropriate County personnel to begin discussions regarding setting goals.	6 months	County, Housing Authority
<p>Action #1.3: City and County work collaboratively to inventory all available publicly-owned land (City, County, State, and Federal) that may be suitable for housing development. Additionally, work with faith-based community and non-profits to identify land they may own for affordable/supportive housing development.</p>	Begin inventorying land and reach out to County personnel to work with them on creating regional inventory list. City and County engage faith-based community and non-profits.	6-9 months	County, MURA, Faith-Based Community, Non-Profits
<p>Action #1.4: Engage private landlords in the city to rent to homeless households and develop a city or region-wide landlord engagement program that could provide funding for financial incentives to local landlords, deposits and application fees, and damage/mitigation funds.</p>	Create landlord engagement campaign targeted at landlords to rent to homeless households. Work with partners to create funding pool that would provide financial incentives to landlords, deposits, damage funds, and other housing related expenses for homeless households to access.	Year 1, ongoing.	CoC, County, Housing Authority, VA
<p>Action #1.5: Increase RRH resources for non-Veteran households, both families and single adults.</p> <p>It is estimated that the region needs to create a MINIMUM of 83 RRH units for single non-Veteran adults and 22 units for non-Veteran families to meet current demand.</p>	City needs to prioritize existing City funds that could be used for the rental assistance portions of RRH. The City should also work with the Housing Authority to understand if there are any rental assistance funds that could be paired with City funds for the use of RRH. The City should then engage in discussions with the County and CCO's to help determine funds to be used to provide the case management support with the rental assistance.	Year 1	Housing Authority, County, CCO's, CoC, and non-profit homeless services providers

Goal #1: Increase the Supply of Affordable and Supportive Housing

Actions	Role of the City	Timeline	Potential Partners
	The City can work with CoC to determine best way to roll out the new RRH program		
<p>Action #1.6: Increase the supply of new PSH units for non-Veteran single adults.</p> <p>It is estimated that the region needs to create a MINIMUM of 259 PSH units (Includes 245 for non-Veteran single adults and 14 for non-Veteran families to meet current demand).</p>	Prioritize the creation of new PSH. This can include acquiring and rehabbing underutilized or closed hotels or motels, using pre-fabricated or modular units on City-owned land while traditional development is considered, and use City-owned property for PSH development. Work with County, VA, CCOs, and ACCESS to discuss funding of supportive services.	Year 1-3, or longer	County, Housing Authority, MURA, CoC, ACCESS, CCOs, Hospitals
<p>Action #1.7: Engage the County, Housing Authority, CCO's, and hospitals to create a PSH pilot targeted to frequent users of healthcare systems.</p>	Convene partners to discuss the creation of a PSH pilot that could be targeted to high-cost homeless individuals. To quickly create a pilot, the most efficient way would be to determine how to create new PSH rental assistance (in form of voucher or other source) and pair with services funds ideally funded by the healthcare sector.	Year 1-2	County, Housing Authority, CoC, CCO's and Hospitals
<p>Action #1.8: Explore zone changes that would facilitate development of affordable housing, including density bonuses, multi-family zoning, and by-right development.</p>	City is responsible for this action.	Year 1	None
<p>Action #1.9: Implement an ADU program to include SDC waivers. Explore opportunities to create a low-interest ADU loan program for homeowners. Develop permit-ready ADU design options.</p>	City is responsible for this action.	Year 1-2	None

Goal #2: Increase Leadership, Collaboration, and Funding

Actions	Role of the City	Timeline	Potential Partners
Action #2.1: Identify a single point of contact within the City who is responsible for homelessness and can oversee Action Plan implementation.	City is responsible for this action.	1 Month	None
Action #2.2: Continue to assess the estimated City and public costs of managing homelessness, including calculating staff time, emergency response, property damage, etc. Use the information to quantify needs and continue to strengthen the business case to invest in housing and services for homeless households.	Work with other sectors including healthcare and criminal justice to identify the costs associated with homelessness.	6 months to 1 year	County, CCOs, hospitals, other Cities
Action #2.3: Create a cross-sector Funders Collaborative that includes both public- and private-sector funders.	Convene all regional public and private funders to establish a regional funders collaborative to begin discussion of funding needs, priorities, and best way to align and increase funding for impact.	Within 6 months, ongoing	County, Housing Authority, other Cities, CoC, VA, CCOs, Hospitals, and private funders
Action #2.4: Support creation and implementation of a City and faith-based collaborative to identify shared goals, coordinate activities, and explore opportunities related to safe parking programs, shared housing opportunities, and affordable housing development. (This can be combined or expanded with CoC Faith-Based Workgroup)	Convene all faith-based organizations within the City on an ongoing basis to discuss needs, strategies, and share best practices.	Within 6 months, ongoing	Faith-Based Community
Action #2.5: Support creation and implementation of a City and business sector work group to address issues, develop education materials, and explore partnership opportunities related to workforce development and training.	Convene the Chamber, DMA, and other interested businesses in the City on an ongoing basis to discuss needs, strategies, and share best practices.	Within 6 months: create work group. Year 1, ongoing: develop education	Chamber, DMA, other business partners, CoC

Goal #2: Increase Leadership, Collaboration, and Funding

Actions	Role of the City	Timeline	Potential Partners
		materials and explore workforce development and training opportunities.	
Action #2.6: Support the creation and implementation of a Lived Experience Advisory Board that would provide input on City policies and programs as well as regional approaches. Determine with the CoC, if this is best created at a regional level as part of the CoC but could still provide input on City specific activities.	Work with CoC and other non-profits to identify potential board members who are current or past participants in homeless services or have been homeless in the city. Act as the group convener and support Board members with incentives for their participation.	6 months to 1 year, ongoing	CoC, Non-Profits, and other CoC partners
Action #2.7: Create an area resource map using Geographic Information Systems (GIS).	Work with CoC and other partners to identify and document available resources for homeless households throughout the city.	1 year	RVCOG, CoC, County, Non-Profits
Action #2.8: Continue to participate and provide leadership within the CoC and invest in build-out of infrastructure through the CoC.	Work with CoC to determine infrastructure needs of the CoC and dedicate funds with other regional partners.	Year 1, ongoing	All CoC partners
Action #2.9: Require applicants demonstrate adherence to best practices and community standards in all City contracts for homeless services.	City is responsible for this action but may need input from CoC on community standards.	Year 1, ongoing	CoC
Action #2.10: Develop a performance culture within the City where City funds are only provided to programs that demonstrate positive outcomes.	City is responsible for this action but may need input from CoC on performance measures.	Year 1-2, ongoing	CoC

Goal #2: Increase Leadership, Collaboration, and Funding

Actions	Role of the City	Timeline	Potential Partners
Review current contracts and potentially shift funding to higher performing projects.			

Goal #3: Address Unsheltered Homelessness and Encampments

Actions	Role of the City	Timeline	Potential Partners
Action #3.1: Create a Greenway Response Ad hoc Working Group to support planning activities and increase collaboration between key agencies and other outreach partners, such as street outreach personnel, MPD, Public Works, County Behavioral Health Services, impacted local businesses, and other outreach partners.	Convene all partners who have a stake in the Greenway.	6 months to 1 year, ongoing	Various City Departments, County, CCOs, CoC, and Business partners
Action #3.2: Increase resources for non-uniformed street outreach services dedicated to single adults and pair outreach staff with MPD.	Dedicate City funds to increasing street outreach services and work with County and other partners such as CCO's and business groups to identify funding to match.	6 months	CoC, County, CCOs, Business partners
Action #3.3: Create a pilot to address encampments in the Greenway to assess individuals, provide intensive supports, and offer housing placements.	As part of Greenway Response Ad Hoc Working Group discuss idea of a pilot.	Year 1	Various City Departments, County, CCOs, CoC, and Business partners

Goal #3: Address Unsheltered Homelessness and Encampments

Actions	Role of the City	Timeline	Potential Partners
Action #3.4: Update City policies related to encampment abatement to include proactive outreach responses and offer support prior to 24-hour posting and abatement.	City is responsible for this action. Update policies based on input from Ad Hoc Working Group and pilot activities	Year 1-2	Various City Departments

Goal #4: Increase Temporary Housing Programs and Successful Placements

Actions	Role of the City	Timing	Potential Partners
Action #4.1: Support the creation of a year-round, low barrier shelter program for single adults, families, and couples. Keep the winter shelter program during first year of operation and consider if needed beyond that timeframe.	Identify site within the city to be used for shelter program and provide funding to help develop and operate as needed.	Year 1-2, ongoing	CoC and County
Action #4.2: As part of year-round shelter, consider creating a Central Access Point within the city that could be the starting place for all populations to access the homeless services system.	Work with CoC to understand if this is needed.	Year 1	CoC
Action #4.3: Only provide City funds to temporary housing programs that have adopted best practices such as Housing First that includes a low barrier entry criteria and harm reduction, uses HMIS, and uses the CES.	City is responsible for this action.	Year 1-2 (can be done in conjunction with activities 1.7 and 1.8)	None

Goal #4: Increase Temporary Housing Programs and Successful Placements			
Actions	Role of the City	Timing	Potential Partners
<p>Action #4.4: Work with interested churches to create safe parking programs in their parking lots. Promote partnerships that provide funding to churches to ensure adequate restrooms and basic services at the lots and funds for service engagement. Engage church volunteers to assist with other services at the parking lots.</p>	<p>Engage area churches to develop safe parking programs. Identify funds to provide to area non-profits or churches to operate programs. Engage CoC to ensure that parking programs are interacting with CES.</p>	<p>Year 1 (note: the City recently passed a safe parking ordinance in Feb 2019)</p>	<p>Faith-Based Community and CoC</p>

Goal #5: Increase Diversion and Prevention Strategies			
Actions	Role of the City	Timeline	Potential Partners
<p>Action #5.1: Increase resources for homelessness prevention and ensure City funds are targeted to households most likely to become homeless and funds are used efficiently.</p>	<p>Conduct assessment of current contracts where the City is providing funds for homelessness prevention and/or emergency assistance and evaluate target populations and outcomes. Based on assessment, increase funding for activities that are making an impact in preventing households from becoming homeless.</p>	<p>Year 1-2</p>	<p>CoC</p>
<p>Action #5.2: Provide increased funding for legal services to support City residents facing eviction.</p>	<p>City is responsible for this action.</p>	<p>Year 2</p>	<p>Center for Nonprofit Legal Services</p>

Goal #5: Increase Diversion and Prevention Strategies

Actions	Role of the City	Timeline	Potential Partners
<p>Action #5.3: Increase diversion training and activities and incorporate into CES and temporary housing programs.</p>	<p>Provide funding to CoC to create and expand Diversion training to all area non-profits. Work with other partners such as the County to provide funding match.</p>	<p>Year 1</p>	<p>CoC, County</p>
<p>Action #5.4: As part of a diversion strategy, increase shared housing and/or roommate matching strategies to connect homeowners who may have a room to rent or to connect homeless individuals together to live as roommates.</p>	<p>Work with CoC to engage in discussions with CoC partners to discuss shared housing models.</p>	<p>Year 1-2</p>	<p>CoC</p>

Appendix A. Documents Reviewed in Development of Action Plan

- Jackson County, Oregon *10-Year Plan to End Homelessness* (June 2009)
- City of Medford, *5-Year Consolidated Plan and Analysis of Impediments to Fair Housing Choice* (May 2015)
- City of Medford, *Comprehensive Plan: Housing Element* (December 2, 2010)
- *Ten-Year Plan to End Homelessness in Jackson County: Progress Highlights on the Six Strategies 2009-2018* (September 2018)
- *Business Perceptions of Homelessness and How Homelessness Impacts Business along the I-5 Corridor in Southern Oregon*, prepared by SOU MBA students (March 2018)
- *Homelessness in Jackson County: Service Providers Perceptions and Needs*, prepared by SOU MBA students (March 2018)
- *City of Medford Residential Homelessness Survey 2018*, prepared by SOU MBA students (January 2018)
- *Southern Oregon University Graduate Research on Homelessness: Presentation to Continuum of Care* (May 2018)
- HUD 2018 Continuum of Care Homeless Assistance Programs Housing Inventory Count, CoC OR-502 Medford/Ashland/Jackson County
- HUD 2018 Continuum of Care Homeless Assistance Programs Homeless Populations and Subpopulations, CoC OR-502 Medford/Ashland/Jackson County
- HUD 2017 Continuum of Care Homeless Assistance Programs Homeless Populations and Subpopulations, CoC OR-502 Medford/Ashland/Jackson County
- *2017/2018 Program Year Consolidated Annual Performance Evaluation Report for the City of Medford Community Development Block Grant Program*
- *Housing Advisory Committee Recommendation List* (undated)
- ECONorthwest memorandum “*Medford Housing Strategy*,” January 8, 2018
- ECONorthwest memorandum “*Policies to Support Housing Development*,” October 24, 2017
- ECONorthwest memorandum, “*Affordable Housing Development Tool Descriptions*,” October 24, 2017
- *City of Medford Ordinance No. 2018-15, adopting an Affordable Housing Construction Excise Tax*
- ECONorthwest, “*Medford, Oregon Housing Market Overview*,” October 11, 2018

Appendix B. Individuals Interviewed for Plan Development and Summary Input

The following table includes the individuals who participated in one on one interviews and shared their impressions and input as stakeholders for the development of this plan.

Name	Title	Organization	Date interviewed
Constance Wilkerson	CoC Manager	Jackson County CoC	Dec 20, 2018
Chad McComas	Executive Director	Rogue Retreat	Jan 2, 2019
Jason Elzy	Executive Director	Housing Authority of Jackson County	Jan 24, 2019
Linda Reid		City of Ashland	Jan 28, 2019
Cindy Dyer Joseph Chick		Columbia Care	Feb 4, 2019
Mary Ferrell		Maslow Project	Feb 8, 2019
Clay Bearnson	Liaison to Housing Advisory Commissions	City Council	Feb 21, 2019
Pamela Norr		Access	Feb 26, 2019
Ed Smith-Burns Maria Underwood	Outreach Director	La Clinica	Feb 26, 2019

From the interviews above several major themes emerged. Below are details of ideas and input under the major themes across the multiple interviews.

CoC structure and function:

- Process of formalizing the CoC Board structure from the initial Task Force signifies the momentum in the community around addressing the issue of homelessness. Collaborative efforts are growing, and the Board is considered high-functioning.
- Across all of the working groups, a broad cross-section of providers and City departments are represented. Demonstrates local buy-in across sectors to tackle homelessness. There are also now more decision-makers at the table.
- Need to identify which players are not at the table for all the CoC work groups. May be missing education and foster care industry, as well as people with lived experience.
- Partners are laying a good foundation now, but stakeholders express the need to pivot from planning to action steps. People are committed to the mission of addressing homelessness, but it is a lot of meetings and people may get burned out without some early wins to demonstrate.
- The partners are still considering whether the Medford/Ashland/Jackson Co CoC should remain independent or merge with the Balance of State CoC.
- The CoC Board and workgroups need a true strategic plan. Some stakeholders cited examples of other CoCs in Oregon that have mobilized and advocated for more funding/resources at all levels.

- CoC needs to create an Inventory/map of available local services [Update: Rogue Valley COG has a GIS specialist working on this in February-March]. The community can also use this inventory to identify if there is any duplication of services.
- There are lots of services, but not necessarily a lot of diversity of services. Many providers are faith-based programs providing basic needs services such as food and hygiene. Needs to be a continuum of services available.

Defining the role of the City:

- The City could play a role in formalizing and strengthening partnerships with faith-based groups, public agencies, faith-based partners, and others; leveraging its position as a convener.
- City Council, city agencies, and the big service providers in the region could leverage their position and influence to advocate for more resources and more buy-in.

Increasing urgency to address homelessness:

- While there is some consensus that local agencies are addressing homelessness more seriously and directly, there is also some feeling that people are caught up in talk and meeting and stakeholders would like to see action steps and projects launched.
- Still battling the perception that homeless individuals come to Medford from other areas, or that if the city provides services more people will move there. Need community education and to fight those negative stereotypes.
- Political pressures are a factor in the new momentum to address homelessness, both on the part of NIMBY groups as well as locals wanting the City to do something about the issue.

Need for shelter:

- Strong consensus that a year-round shelter is needed. Difficult to identify a suitable site, for technical reasons as well as NIMBYism.
- Need for more domestic violence/sexual assault shelters, as well as more transitional housing for youth. The available shelter services for families can be high-barrier (e.g. only open to heterosexual couples, etc.).
- Several stakeholders cited the shelter in Ashland as an example that Medford could draw lessons from.

Lack of funding and other resources:

- Medford is relatively rural, and the community is generally underfunded and under-resourced. Several key services are missing. The lack of funds is a serious issue for sustaining or creating programs and also developing more affordable housing. There is a goal to expand the CoC grant.
- There is limited institutional knowledge of homeless services best practices. The learning curve can be steep for agencies such as law enforcement or the Mayors' offices.
- Lack of resources creates competition between providers. Agencies can be territorial. Just a few players dominate the services market.

- For homeless families and individuals, they can get ‘trapped’ in CES while higher-needs people get access to the limited available services. The existing emergency shelter functions more like transitional housing because there is a waitlist. Clients can’t just walk in.

Lack of available affordable housing stock:

- Critically low affordable housing stock available. There are numerous stories of working poor and people on fixed incomes (such as seniors) falling in to homelessness. Stakeholders expressed some interest in manufactured/modular homes to increase stock.
- Housing Authority tries to bring 150-200+ units of housing online every year, but there is a lack of developers and funding. City could increase their role in affordable housing development, such as by lowering fees, making zoning changes, and/or participating directly in construction. City can also work with the Housing Authority to engage more housing developers.
- City could also make zoning changes to make it easier to construct shelter and transitional housing, as well as inventorying vacant and blighted properties for conversion. One stakeholder had a comment about the City working well with providers and partners on housing for people in substance use treatment or recovery.
- Critical need for workforce housing.

Programming ideas:

- Stakeholders cited the dominance of programs that are faith-based, and may not be strictly adhering to best practices. They fill a need, but the community also needs programs for clients who do not or cannot meet program requirements.
- Lack of cohesive street outreach program. Maslow project does outreach to youth and families, and the PIT Count offers limited opportunities to do outreach to the unsheltered population, but it is not a structured program. Providers may be able to leverage the La Clinica mobile clinics to aid in outreach strategies.
- Medford PD Greenway clean-ups are currently the only real street outreach and it is not necessarily focused on connecting people to housing or services.
- There are no dedicated funds to incentivize landlords to rent to homeless households. There is also a need for an eviction prevention program and other forms of landlord engagement.
- Need for a drop-in center and safe parking or safe camping area for unsheltered homeless individuals who may not be able to go into shelter. [Update: in February, the City approved a safe parking ordinance.]
- The Housing Authority wants to develop and manage PSH and is planning to apply to do so in 2020. The Housing Authority is overall interested in creating more homeless housing. They want to be a model for other Authorities and other states.
- The City can create additional financial mechanisms to spur affordable housing development, such as bonds, TIF, creation of an urban renewal agency in partnership with the Downtown Business Alliance, and more. The excise tax is helpful but is not enough to meet the need.
- Leverage Urban Growth Boundary policies to incentivize more building. Affordable Housing development needs to be blended into other development, rather than a “donut” effect as the city grows.
- Need to more thoughtfully engage healthcare partners.

- Critical need for a community education initiative.
- Navigation between agencies needs to be improved. Clients need a “warm handoff” between agencies wherever possible.
- Critical need for more mental health services and also crisis intervention services.
- Stakeholders would like to see a roll-back “criminalization” policies such as ticketing and move-along efforts.
- The business community is a strong voice on the issue of homelessness. There seems to be interest in defining a role for businesses, including the Downtown Business Alliance, agriculture, and the Chamber of Commerce.
- Project Community Connect event cited as a successful example of coordination between providers, but that is only once a year. That level of coordination and cooperation should be expanded and happen more frequently.

Data:

- Use of HMIS is increasing, but still needs to reach a critical mass to have effective data analytics.
- There are several programs, although not enough to meet the need, but there is no place for people to go after they stabilize. Need to be able to track program outcomes once people transition into housing. This will help ensure limited resources are prioritized and functioning efficiently.
- Would be helpful to have costs of what the City is currently spending just to manage homelessness. Need to be able to demonstrate the cost-benefit analysis and compare to examples of Housing First interventions.
- CCOs are a critical partner. The community needs better data sharing and the ability to share housing status data across healthcare and other service agencies.
- Need to use data to identify people’s unique needs. There is a perception among some stakeholders that a one-size-fits-all approach is often taken when addressing homelessness, but people need tailored services.
- City needs to complete an inventory of all available beds, regardless of funding source, so that they have a full list and can weigh that against PIT numbers to identify gaps and needs.

Appendix C. Feedback from Survey

In order to collect as much qualitative data as possible about the strengths, gaps, needs, and challenges of the Medford/Jackson County homeless services system, the consulting team, in collaboration with City of Medford staff, created and distributed a survey to numerous local stakeholders representing several different sectors.

The short survey, nine open-ended questions, was developed using Survey Monkey and distributed via email to stakeholders identified by City staff. The link to the survey was sent to recipients January 18 and was open for two weeks. In total, 81 respondents completed the survey. Summary information is compiled below.

Q1. Which of the following best describes your organization?	
City agency	12.35% (n=10)
Other government agency	11.11% (9)
Faith-based organization	23.46% (19)
Nonprofit homeless service provider	24.69% (20)
Other community nonprofit	28.4% (23)

Note: some respondents may fall into more than one category (e.g. a City employee who is also active in the faith community) but the survey requested one answer only.

Q2. Please describe what you see as current system strengths.

Common themes:

- Partnerships, community buy-in, good working relationships and coordination among providers.
- Momentum and vision, willingness to address homelessness in the region.
- The CoC structure, various working groups, and the role of the Homelessness Task Force.
- Beginning to implement coordinated entry, increasing access to federal and state funding.
- A few respondents said “none” or otherwise had negative things to say on this point.

Select quotes:

“Good working relationships, buy in, willingness to try new ideas.”

“Community providers that works well together.”

“Lots of people who care.”

“People are paying attention.”

“Too early to tell...”

Q3. Please describe what you see as gaps in the current system.

Common themes:

- Need for more affordable and supportive housing stock.
- Lack of available mental health and substance use disorder services locally.
- Acute need for more emergency shelter, interim, and transitional housing beds.

Select quotes:

“Not enough resources available.”

“Housing availability, shelters with ease of access, low income housing.”

“I think the biggest gap is mental health support.”

“Hospital discharge protocols, lack of shelters or safe places for the homeless community to gather without interference.”

Q4. Which groups of people experiencing homelessness do you think have the greatest needs in the community (e.g. Veterans, youth, etc.)?

Common themes:

- Every subpopulation of people experiencing homelessness was called out in some form in response to this question: Veterans, youth, families, chronically homeless individuals, families, people with mental illness, etc.

Select quotes:

“If they are homeless, they all have needs. Everyone is different.”

“Youth and families are more vulnerable than a healthy adult.”

“Anyone who does not have a home! I understand the need for data, but we get so bogged down with collecting data... we contribute to the slow pace of problem solving.”

“All, don't segment.”

Q5. Describe one or two things you'd like to see the City take on in the short-term (1-3 years) to address homelessness.

Common themes:

- Develop more emergency and transitional housing, especially a year-round shelter. Safe parking and/or safe camping style programs were also referenced.
- Remove barriers to building more affordable housing.
- Homelessness prevention.
- Increase mental health services.

Select quotes:

“Provide more year-round shelter and a couple of car camping sites.”

“Permanent homeless shelter and building more subsidized housing.”

“More housing.”

“Have mental health be accessible immediately without having to send someone to the hospital.”

“Prevention programs.”

“Coordinated regional no/low barrier shelter. Family shelter.”

Q6. Describe one or two things you'd like to see the City address in the long-term (5+ years) to address homelessness.

Common themes:

- Increase the stock of affordable housing. Some respondents specifically called out innovative or creative models to reduce costs, such as modular construction or tiny homes.
- Workforce and career services to increase income and financial stability.
- Greater investment in mental health services.
- Tenant protections.
- Many respondents said “unsure” or “don't know.”

Select quotes:

“The building of more low-income housing.”

“Career retraining and mental health support.”

“Build more affordable housing.”

“Jobs, meaningful employment and education opportunities that will reduce the cycle of poverty.

More funding into law enforcement and social services for drug abuse and domestic violence.”

“Rent Control.”

“Continued investment in affordable housing with lower barriers to entry. More robust volunteer network for those to add community connections and networking.”

Q7. Describe one or two things you'd like to see the regional CoC address in the short-term (1-3 years).

Common themes:

- Increase coordination among partners and engage the community more.
- Open a year-round shelter.
- Better data collection. Many responses were essentially describing a Coordinated Entry System.
- Many respondents were not familiar with the local CoC or knew the purpose of the continuum.

Select quotes:

“Engaging more service providers in collaboration. Completing development of the use of shared database and wrap arounds.”

“Help agencies input accurate and complete info, and for them to access the list to provide services.”

“Stop talking set some measurable goals and coordinate their accomplishment.”

“Identify a permanent shelter facility. Engage Jackson County as a financial partner.”

“I don't know what the CoC does vis-a-vis the city.”

Q8. Describe one or two things you'd like to see the regional CoC address in the long-term (5+ years).

Common themes:

- More housing was almost universally the answer to this question.
- As notes above, many respondents were unsure the role of the CoC.

Select quotes:

“More housing.”

“Affordable housing.”

“Invest in more supportive housing models.”

“Housing, more housing.”

“Not sure.”

Q9. Do you have any additional thoughts or comments you'd like to share?

Common themes:

- Many people responded “no” or “N/A” to this question.
- Several respondents expressed thanks and appreciation for the City, service providers, and the region continuing to address the issue.
- Several others expressed compassion and support for addressing the needs of people experiencing homelessness locally.

Select quotes:

“In general, seems the population is getting more acute both medically and mentally and require housing with additional supports in place.”

“Any programs that have worked for other cities across the country should be given careful thought and consideration. Our goal should always be to restore the dignity and self-worth of every homeless individual whatever form that takes.”

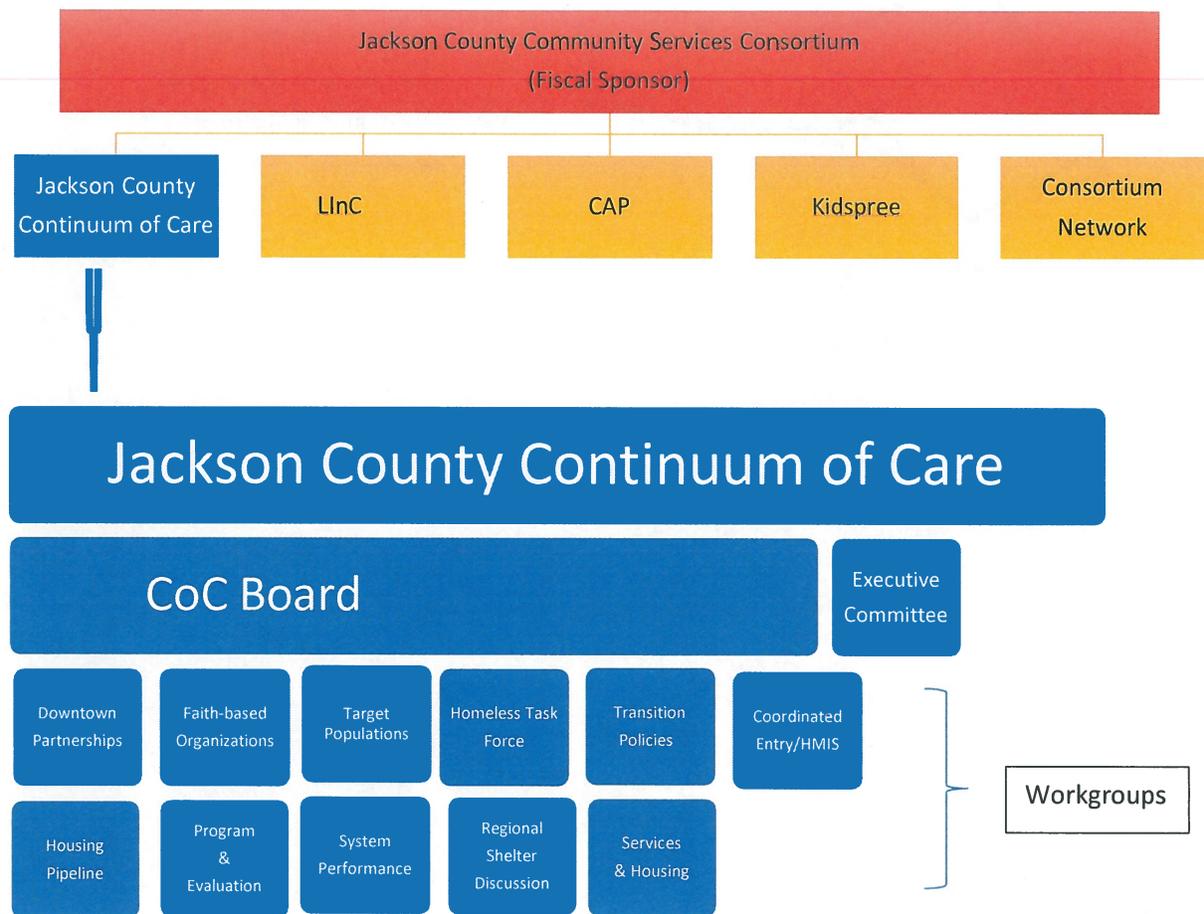
“We are making great progress, but unfortunately the need is growing quicker than our progress.”

“Thank you for continuing to work on this. I would like to participate in any way that I can.”

Appendix D. Jackson County 2019 CoC Organizational Chart



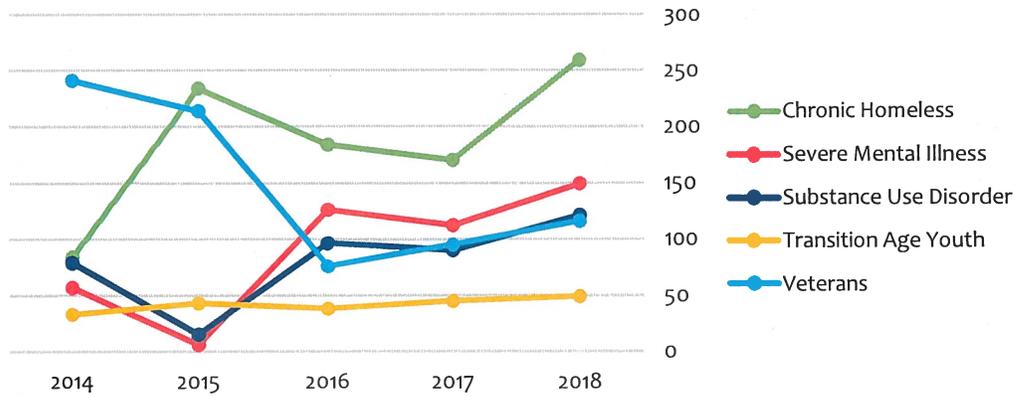
Jackson County Continuum of Care 2019 Organizational Chart



Appendix E. CoC Point-In-Time Count Sub-Population Trends

The following chart displays 5-year CoC trend data of specific sub-populations as part of the annual PITC. As indicated in the chart chronic homelessness, those with severe mental illness, and those with a substance use disorder have seen increases over the past five years, while Transition Age Youth have remained relatively stable, while Veteran homelessness has decreased.

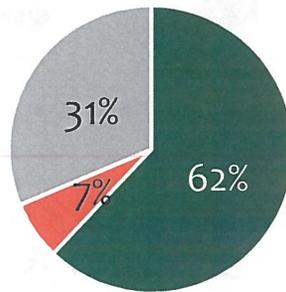
CoC Point-In-Time Count Subpopulation Trends



Appendix F. 2018 CoC Rapid Re-Housing Annual Performance Report

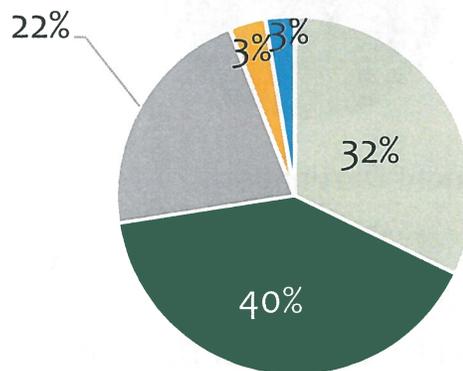
The following charts highlight data from HMIS regarding the population served and the outcomes of all PSH program in the CoC for 2018. Specific data includes where individuals were staying the night before they entered the program, income levels at program entry, number of conditions including mental illness, substance use disorder, and chronic health conditions at entry, length of participation in the program, and exit destinations for those who stayed more than and less than 90 days.

Prior Living Situation



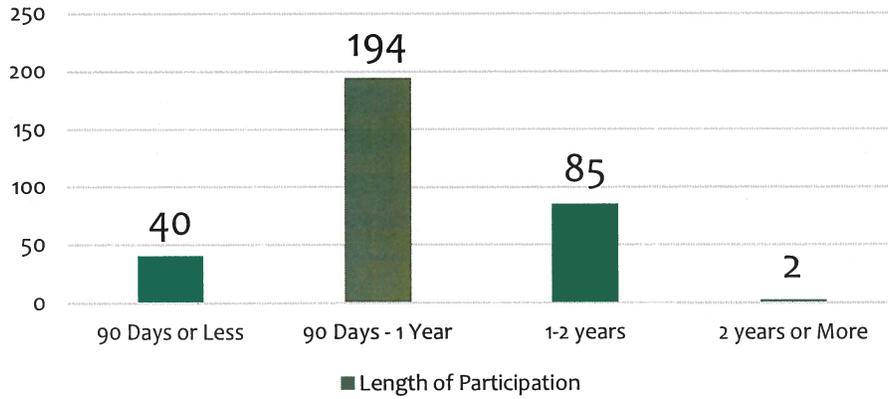
■ Homeless ■ Institutional Setting ■ Housed

Income at Entry

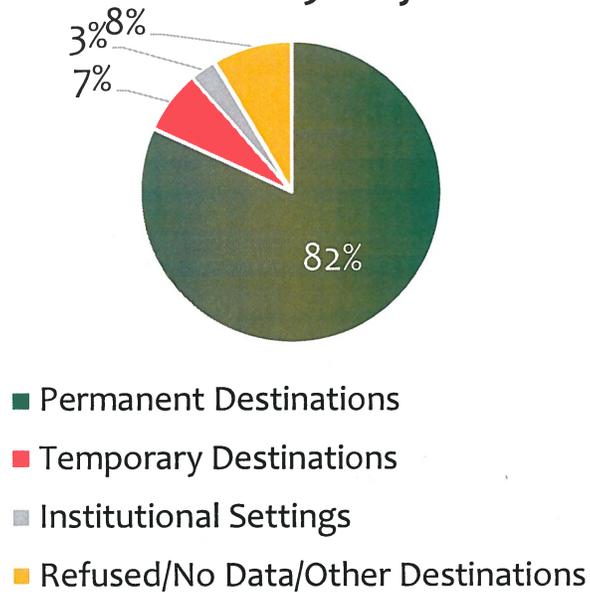


■ No Income ■ \$1 - \$1000
■ \$1001 - \$2000 ■ \$2001 +
■ Data not collected

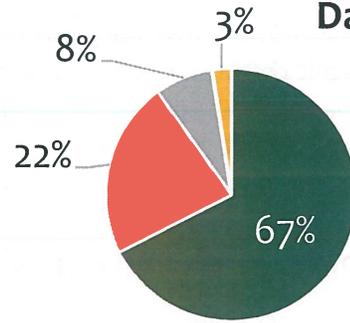
Length of Participation



Exit Destinations for Persons who Stayed More than 90 Days



Exit Destinations for Persons who Stayed Less than 90 Days

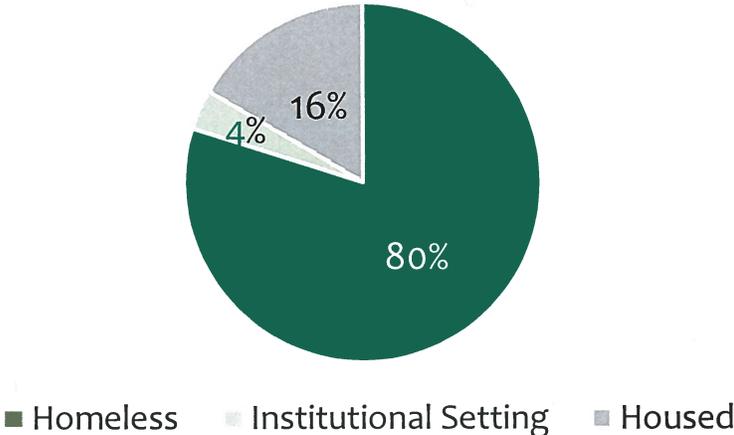


- Permanent Destinations
- Temporary Destinations

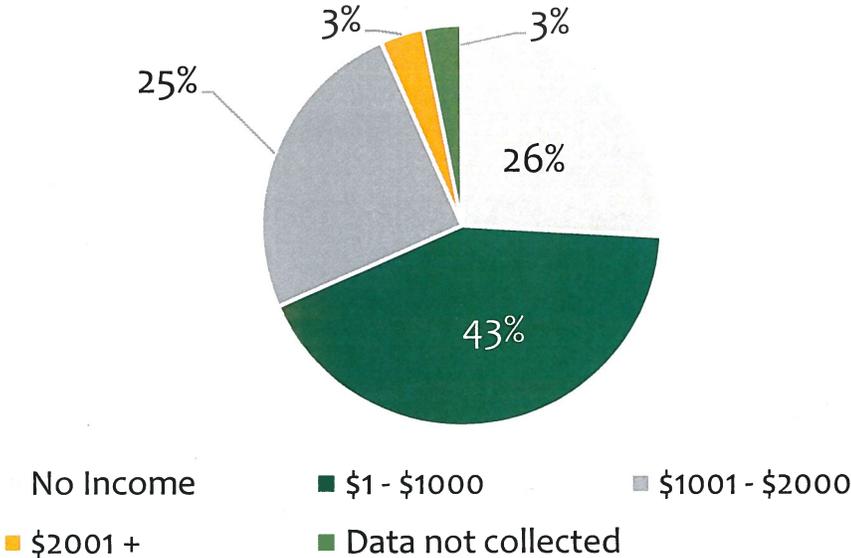
Appendix G. 2018 CoC Permanent Supportive Housing Annual Performance Report

The following charts highlight data from HMIS regarding the population served and the outcomes of all PSH program in the CoC for 2018. Specific data includes where individuals were staying the night before they entered the program, income levels at program entry, number of conditions including mental illness, substance use disorder, and chronic health conditions at entry, length of participation in the program, and exit destinations for those who stayed more than and less than 90 days.

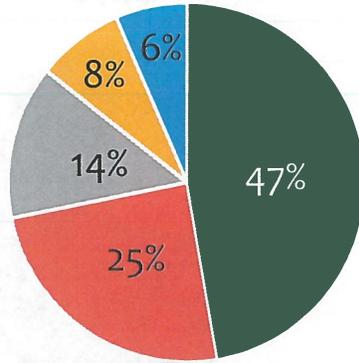
PSH Prior Living Situation



Client Income at Entry

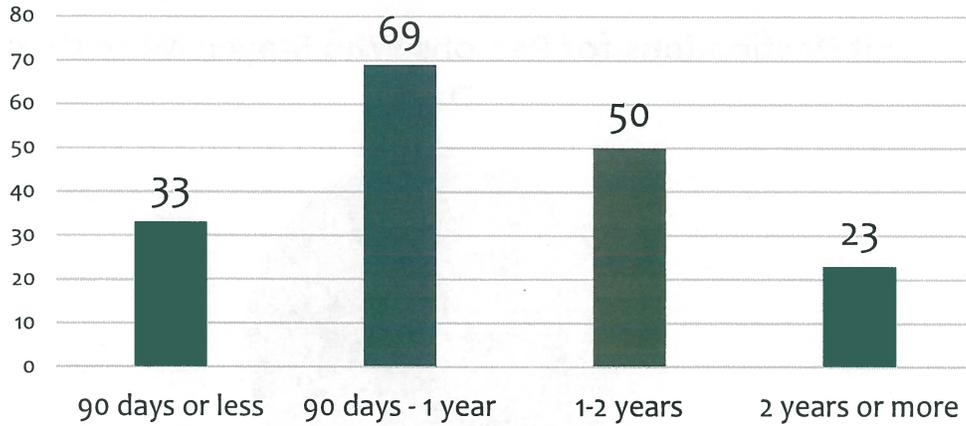


Number of Conditions at Entry

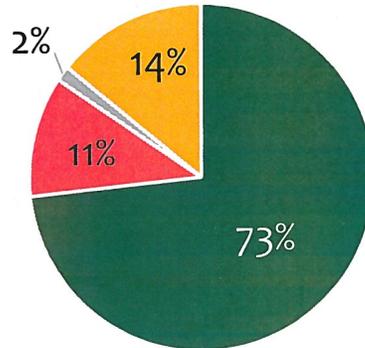


■ None ■ 1 ■ 2 ■ 3+ ■ Condition unknown

Length of Stay for Program Leavers

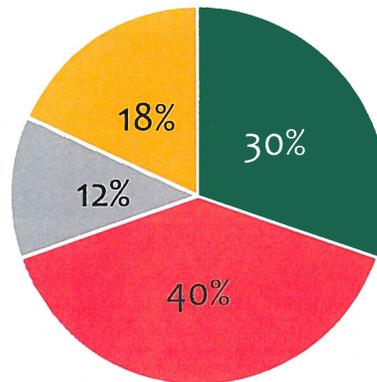


Exit Destinations for Persons Who Stayed More than 90 Days



- Permanent Destinations
- Temporary Destinations
- Institutional Settings
- Refused/No Data/Other Destinations

Exit Destinations for Persons Who Stayed More than 90 Days

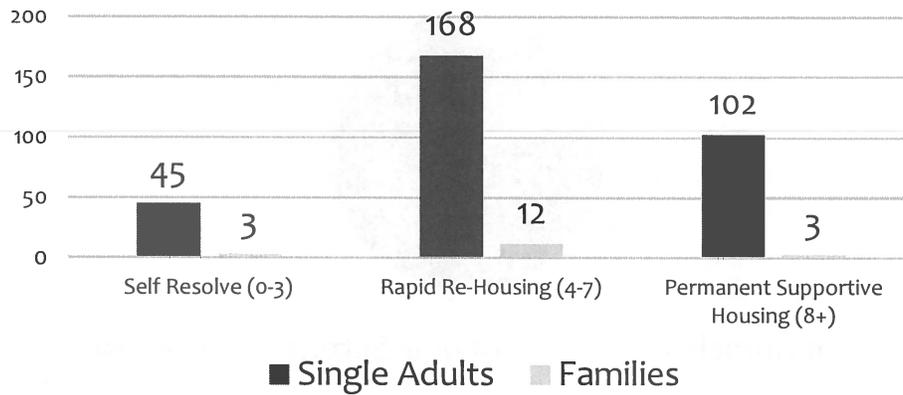


- Permanent Destinations
- Temporary Destinations
- Institutional Settings
- Refused/No Data/Other Destinations

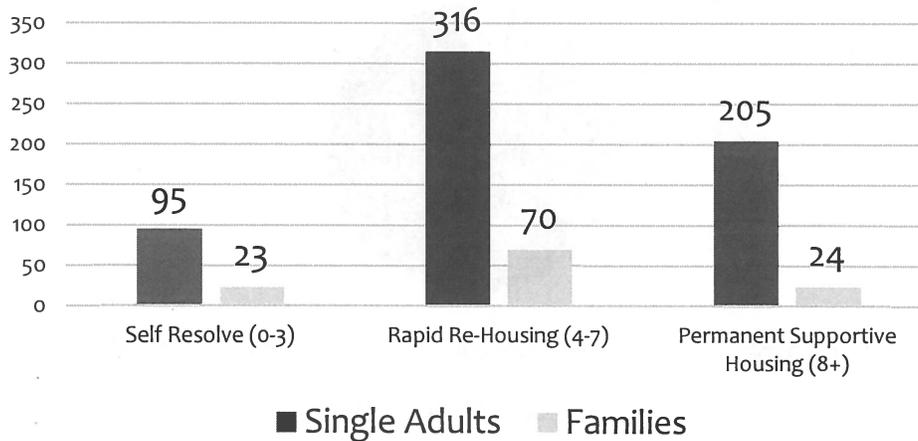
Appendix H. Coordinated Entry System Analysis

The following charts highlight assessment data from the VI-SPDAT as part of the regions CES. The charts are divided into two populations – Veteran households and non-Veteran households. For each population the chart includes the total number of households both singles and families who have been assessed and recommended for the various housing interventions from the VI-SPDAT. This data is from the current CES By-Name-List as of February 2019 and indicates the number of households who are awaiting a housing resource.

Veteran Households



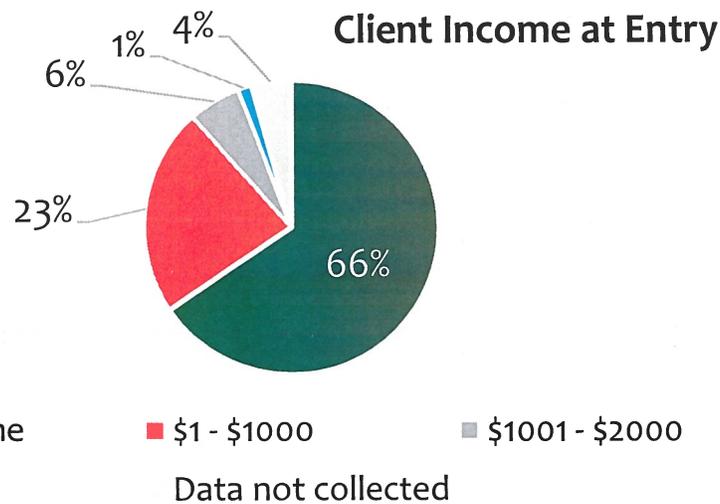
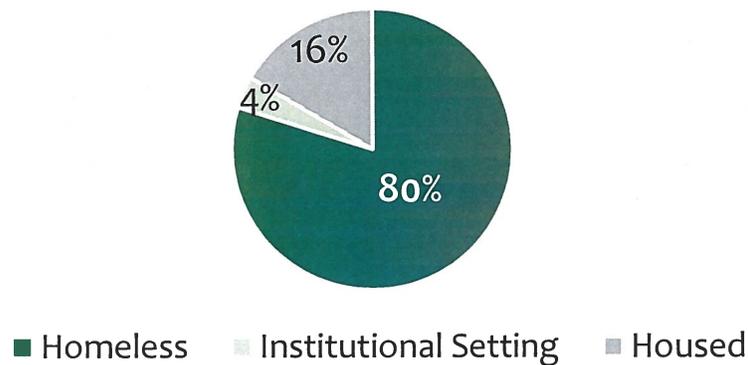
Non-Veteran Households



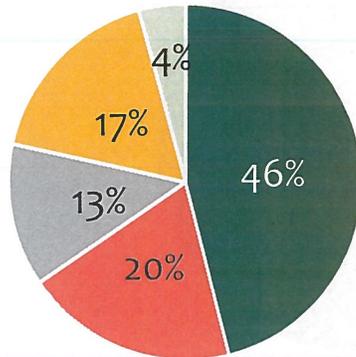
Appendix I. Analysis of Kelly Winter Shelter Program

The following charts highlight data from HMIS regarding the population served and the outcomes of the Kelly Winter Shelter for the winter season starting in December 2017 through March 2018. A total of 139 single adults were served at by the shelter during the period. Specific data includes where individuals were staying the night before they entered the program, income levels at program entry, number of conditions including mental illness, substance use disorder, and chronic health conditions at entry, length of participation in the program, and exit destinations.

Prior Living Situation

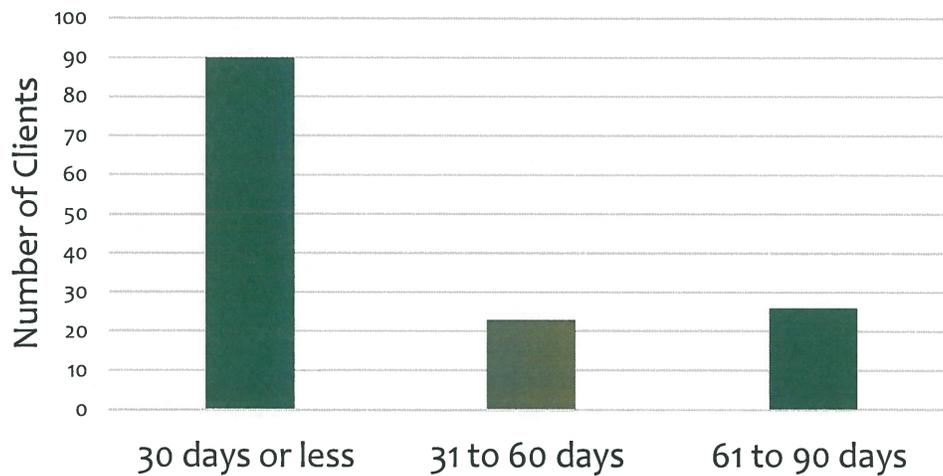


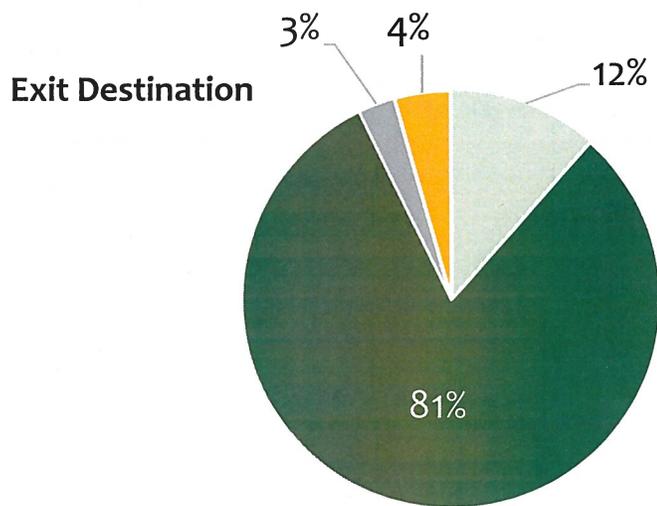
Number of Conditions at Entry



■ None ■ 1 ■ 2 ■ 3+ ■ Condition unknown

Length of Participation





- Permanent Destinations
- Temporary Destinations
- Institutional Settings
- Client Doesn't Know/Refused

Appendix J. Jackson County Investments that Assist Homelessness

Program	Population	Dollar Amount	Description
Adult Foster Homes	SPMI	\$ 86,264 (plus Overhead and supervision)	Supporting and development of adult foster homes around the county for individuals that meet the criteria for needing this level of service. Currently have 87 individuals in these homes. (1.0 FTE FY 18-19 projected)
Choice Fund	Mitigation of barriers to community based living/care for individuals discharged from (or avoiding admits to) Oregon State Hospital	\$27,544 45000	Rent and deposit support, short term motel, room and board fees, basic living expenses related to stabilizing housing and community based living/care. FY 17-18 year to date (projected \$45,000).
ACT, Forensic, and Adult Outpatient	SPMI	\$23,540 35000	Rent and deposit support, short term motel, room and board fees, basic living expenses related to stabilizing housing and community based living/care. FY 17-18 year to date (projected \$35,000).
Transition Living	Assisting people in gaining skills while they await housing opportunities	\$ 22,000	Renting of two properties through ACCESS to serve up to 12 individuals that are involved in MH services (FY 18-19 budget)
Maslow Project	Youth and Families	\$124,789	Funds additional outreach worked to assist youth and families as they work through homelessness challenges (FY 18-19 budget)
Kelly House	Adult Males	\$ 35,814	8 bed capacity for males providing transition housing services for individuals in early recovery of their substance use disorders (FY 17-18 contract)
Compass House	Adults with mental health issues	\$500,000	Initial set up costs for establishing the first accredited Clubhouse Model in the state of Oregon. (Jul 2014 – Mar 2018)
Salvation Army	Hope House	\$ 28,000	Human Service Grant – safety net services. Services single men, woman and families, providing transitional housing, seven day a week case management and supportive services.
ACCESS	Rental assistance for seniors with disabilities	\$ 9,600	Human Service Grant – safety net services. Provides rental assistance for low-income seniors and persons with disabilities to prevent eviction and homelessness.
Community Works	Dunn House for domestic violence victims	\$ 24,300	Human Service Grant – safety net services. 24 hour Emergency Shelter for women and children to help them escape from domestic violence and sexual assault. Provides safe environment with food, clothing, support, education, safety planning, resource referrals and assists keeping this vulnerable population off the street.
Columbia Care Services	Rental Assistance Program	\$115,000	Contracted not to exceed amount for Case Manager to support individuals in grant funded Rental Assistance Program (Feb 2015-Mar 2017)
Living Room	Individuals in mental health crisis	\$54,000 (plus OH and supervision)	A peer based model offering support to individuals in crisis offering them resources to help get them back on their feet and stable enough to not go to the hospital. Cost of peer personnel and program supplies (food, emergency clothing, sleeping bags, etc). (FY 18-19 budget)
	Total Investment	\$1,050,851.00	

Created 4/17/18

Appendix K. Jackson County Mental Health Information & Services

COMMUNITY OUTREACH AND EDUCATION

JCMH receives frequent requests to deliver presentations to community groups about behavioral health needs and services. In FY 16 - 17, JCMH staff presented to the following groups:

- Asante/NAMI Mental Health Forum
- Community Care Project
- County Public Forum (Sheriff's Office)
- Foster Parent Training
- Jackson Care Connect CCO
- Local Alcohol and Drug Planning Committee
- Mental Health Advisory Committee
- National Alliance on Mental Illness: Family to Family
- Oregon Pain Guidance
- Public Safety Coordinating Council
- Public Safety Coordinating Council Mental Health Task Force
- Rogue Community College
- Southern Oregon Success Advisory Council
- Southern Oregon University – various classes in Human Services and Counseling programs
- TIC Steering Committee
- Traditional Healthcare Workers Course (RCC)
- Vocational Rehabilitation

Jackson County Mental Health (JCMH) is the designated Community Mental Health Program (CMHP) and the Local Mental Health Authority (LMHA) for Jackson County. Through this designation, JCMH provides medically necessary mental health services to children and adults with severe or chronic psychological or emotional problems, with direct responsibility for the indigent population. JCMH helps individuals resolve crisis situations, develop skills to improve their functioning in daily life, and reduce criminal justice involvement. Utilizing a recovery model, it supports individuals with serious mental disorders to sustain stable lives in the community. Additionally, JCMH provides mental health promotion and prevention. JCMH is the safety net for the community and will continue to deliver services as outlined in the Inter-Governmental Agreement (IGA) with the Oregon Health Authority (OHA).

EVIDENCE BASED PROGRAMS

ASIST Training: ASIST (Applied Suicide Intervention Skills Training) is a two day suicide prevention training designed for counselors, teachers, mental health specialists and other gatekeepers who want to feel more comfortable, confident and competent in helping to prevent the immediate risk of suicide. ASIST is recognized as an Evidence-Based Practice by the state of Oregon.

Mental Health First Aid: Certified staff members offer Mental Health First Aid to community partners throughout Jackson County as part of JCMH's prevention efforts. The interactive 12-hour course provides an overview of mental illness and substance use disorders in the U.S., introduces participants to risk factors and warning signs of mental health problems and reviews common treatments. In addition to our adult trainers, Jackson County Mental Health has a certified adolescent Mental Health First Aid Trainer. These staff, in collaboration with the two certified instructors at the FQHC, will continue to offer trainings across the County.

Mental Illness Prevention with Homeless Youth and Families: In collaboration with Maslow Project, JCMH provides outreach and support services to homeless individuals at risk for the development or escalation of mental health symptoms. These dollars were originally received through a grant from OHA and is now part of the ongoing IGA that JCMH receives annually. The purpose of this project is to facilitate access to the services needed to address health issues, find housing, and prevent the onset or worsening of mental health symptoms. Youth are served with coordinated prevention services, including risk assessments, goal plans, monitoring of school

attendance and academic progress, linkages to additional support services and referrals. Additionally, all ages receive basic needs and emergency services intended to reduce the risk of mental health crisis and escalation of instability.

Suicide Prevention (Garrett Lee Smith): Jackson County is partnering with the Oregon Health Authority on a federal grant (FY 14-19) to reduce suicide among youth aged 10-24 through implementing comprehensive suicide prevention and early identification practices. A full-time suicide prevention coordinator is dedicated to increasing gatekeeper training, facilitating training for clinicians, improving the continuity of care, and improving data collection.

Wellness Action Recovery Planning (WRAP): WRAP is an evidenced-based, trauma-informed model for personal wellness and recovery rooted in the principals of self-determination and empowerment. It encourages and provides participants with the tools they need to be more involved and proactive in their own wellness and success. Jackson County Health and Human Services (HHS) has enlisted WRAP as a transformative recovery tool for staff, clients, family members, supporters, partners and our community as a whole.

PREVENTION COALITIONS

Oregon Pain Guidance (formerly Opiate Prescribers Group)/Bureau of Justice Affairs Prescription Drug Monitoring Grant: The *Opioid Prescribers' Group* (OPG) formed in 2011 in response to the growing number of prescription opioid overdose deaths in our community. Since that time, the group has grown to impact well over 500 Southern Oregon professionals from Jackson and Josephine counties and beyond. The OPG sponsors monthly meetings, outreach to clinics, an annual Pain Conference and an off-shoot Pain Resiliency Clinic co-located within Health and Human services. The group has published Community Practice Guidelines and received a 405K federal grant to expand this work to partners in the community justice field, supporting community initiatives such as Naloxone training and administration protocols and notification procedures between criminal justice staff and opiate prescribers.

Substance Abuse Prevention Coalition: The Jackson County Substance Abuse Prevention Coalition utilizes the structure of the Strategic Prevention Framework per the expectations of the Oregon Health Authority. The purpose of the coalition is to collaboratively address and reduce alcohol, tobacco, other drug, and gambling problems among Jackson County youth. The primary goal of the coalition is to utilize the Strategic Prevention Framework to address alcohol abuse among youth as well as other focus areas as determined by the coalition. Coalition members include stakeholders from across multiple community sectors including healthcare professionals, religious organizations, parents, schools, youth-serving organizations, local government, and treatment organizations.

Youth Suicide Prevention Coalition: The *Jackson County Youth Suicide Prevention Coalition* is a community based, volunteer membership organization comprised of representatives from public secondary schools and colleges, hospitals, non-profits, community organizations, Juvenile Justice, Mental Health, Veteran's Services, and local volunteers. The mission of the Coalition, available on our website at <http://suicidepreventionjacksoncounty.com/>, is to raise awareness of the problem of suicide in our county, reduce the incidence of suicide and suicidal behavior of Jackson County youth, and provide support for all those affected by suicide. The group keeps a comprehensive list of community resources and announcements on the website, as well as a Facebook page,

<http://www.facebook.com/pages/Jackson-County-Youth-Suicide-Prevention-Coalition/140443226004431>).

CRISIS AND STABILIZATION

As part of our CMHP status, Crisis Services will continue to be available through JCMH 24 hours a day, 7 days a week. Services include assessments, referrals, pre-commitment services, discharge planning, and a range of drop-in support and community resource groups. Services are available to everyone regardless of age, insurance status, Veteran's status or county of residence. Nearly 5000 individuals per year receive services through JCMH's Crisis Program, an estimated 1900 of whom are indigent, i.e., lack Medicaid or any other form of insurance coverage. Points of access include the walk-in clinic at 140 S. Holly in Medford, telephone referrals through local hospitals, police and social service agencies, and the after-hours hotline (541-774-8021).

Emergency Department Diversion for Children and Youth: JCMH receives dollars from the state of Oregon to provide diversion services for children and youth that are taken to the Emergency Department at local hospitals for psychiatric and behavioral crises. Services are immediate and delivered in the home and in the community to assist in providing stabilization services and assisting the families in getting the children and youth established in services.

Living Room: The "Living Room" program opened in July, 2016. This is a program designed to offer individuals in crisis an alternative to obtaining services in an emergency department. The Living Room is a research-based model offering a person-centered, non-medical environment staffed by peer specialists and professionals who are available to help clients de-escalate and avoid hospitalization, and is part of the crisis continuum.

Mobile Crisis: JCMH received funding from OHA to expand Mobile Crisis services. JCMH currently assists local law enforcement with mental health situations as needed. This has proven to be very effective and has had some positive outcomes for the individual to engage in appropriate treatment options rather than being taken directly to the emergency room or incarcerated. These services will continue as part of our CMHP obligations.

Pre-Commitment Investigations and Commitment Monitoring: JCMH is responsible as the Local Mental Health Authority to conduct pre-commitment investigations for individuals placed on a mental health hold to determine if the individual meets criteria for civil commitment. Investigations include interviews with police, family members, medical and behavioral health providers, and/or any other individual who holds information that maybe pertinent to a decision. Outcomes of the investigation include one of three options: the hold is dropped, the hold is extended (14 day diversion) or a commitment hearing is scheduled. Investigators work directly with an Assistant District Attorney who specializes in legal issues for individuals with mental health issues.

CHILDREN'S TREATMENT SERVICES

With the changes in the mental health service system in the county, services to children and youth have drastically changed and have had a large reduction in the numbers that we serve. JCMH continues to provide services to indigent and uninsured children and youth and some limited services (WRAP and EASA) through a contract with Jackson Care Connect. JCMH is not currently serve any AllCare children or youth in ongoing services. Access to services occurs through an initial assessment. The assessment will

Parent-Child Interaction Therapy CENTER OF EXCELLENCE

P-CIT is an evidence-based treatment for children 2-8 years old with social-emotional and behavioral problems that places emphasis on improving the quality of the parent-child relationships and changing parent-child interaction patterns.

In 2014, JCMH was named the Oregon P-CIT Center of Excellence and charged with training all P-CIT providers across the state. JCMH currently employs two nationally certified trainers.

Studies show that P-CIT reduces depression in mothers and reduces overall family stress; improves pro-social behavior and emotional regulation; and improves speech and language skills, among many other things. A new space has been designated for this program, designed with input from program experts.

establish a diagnosis, if appropriate, and the appropriate level of care, and the child will then enter into treatment planning for outpatient care or receive a referral to a more appropriate resource.

Children's WRAP: Jackson County utilizes the National Wraparound model and is part of the Statewide Children's Wraparound Initiative as one of the three demonstration sites. Jackson County Wraparound is an intensive, integrated, holistic method of engaging children, youth, and their families with complex needs in a planning process. The primary goal is to keep children living in their homes and communities safely. The wraparound team takes a strength based approach and develops a plan that focuses on the priority needs as identified by the youth and family. The current project focuses on children in the custody of DHS Child Welfare or children who have behavioral, emotional, and/or mental health conditions severe enough to warrant direct entry into the service system at a high level of care. Jackson Care Connect has contracted with JCMH to serve 45 children and youth in the WRAP program.

Medford Drop (Young Adult Hub): Originally funded through a grant offered through OHA, these dollars now come to JCMH through the IGA and are passed on to Youth ERA Oregon (formerly Youth M.O.V.E Oregon). The purpose of this project is to: a) provide outreach, engagement and recovery oriented young adult centered planning and creation of social support systems, b) provide peer support services by young adult peers, particularly for young adults reluctant or disengaged in services, c) assist young adults in identifying and accessing resources to fit goals, d) demonstrate expertise in LGBT youth and connection to LGBT specific resources, e) participate in a statewide learning collaborative, and f) incorporate at least the philosophy and ideally the practice of the Transition to Independence Process (TIP) Model of support for Youth Adults in Transition. Partnering with Youth ERA Oregon, JCMH supports this drop-in center model, *The Medford Drop*, for youth ages 14-25; the focus of the program is education, employment and social connectedness, as well as character development and community service.

Early Assessment and Support Alliance (EASA): The purpose of the EASA program is to identify young adults, aged 15-25, who are experiencing (or are at high risk for experiencing) a newly emerging psychotic disorder. This program is geared towards providing intensive services as soon as possible to reduce the symptomology of this disease and decrease the negative impacts of the disease over the life course. The EASA program provides youth/young adults experiencing an onset of psychosis with the following services: trauma-informed mental health counseling utilizing the most current evidenced-based research and modalities; case management that provides youth assistance with financial, housing, relationships, school, and other areas which have been affected by their illness; supportive employment; peer supports; psychiatric and medication services; occupational therapy that helps youth and their family understand sensory issues and strategies for improving the outcome of treatment; family support, education and stress reduction activities; and crisis intervention with an enduring focus on helping young people to flourish to the greatest extent possible. These services will continue as appropriate for non-OHP members, and for five Jackson Care Connect clients as contracted.

ADULT TREATMENT SERVICES

Adult Outpatient Treatment

Jackson County Mental Health continues to provide outpatient services for indigent and uninsured throughout the county. Focusing on short term, solutions focused treatment, in addition to some long term services for those individual with Severe and Persistent Mental Health diagnoses.

Assertive Community Treatment (ACT): ACT is an evidenced based intensive and community-based method of providing mental health care. Clients with serious and persistent mental illness or personality disorders are provided an alternative to traditional outpatient mental health care through an integrated community based team. Persons served by ACT may receive integrated substance abuse treatment, housing support, CBT, DBT, skills groups, peer supports, and Supported Education or Employment. Jackson Care Connect has contracted with JCMH for 35 ACT slots. JCMH will continue to offer these services to the indigent and uninsured.

Birch Grove Clinic: The mission of the Birch Grove clinic is to provide an integrated primary-behavioral healthcare service that includes health education as a strong component. A collaboration between JCMH, La Clinica, the Addictions Recovery Center, On Track, and the two CCO's the clinic is housed at the HHS building.

Jail Diversion: A partnership with the Jackson County Community Justice program, this program focuses on assisting adults with mental health issues to avoid becoming more entrenched with the criminal justice system through offering support and treatment. Program staff complete behavioral health screenings and provide collaborative release planning within the Jackson County Jail and the Community Justice Transition Center. These positions are funded through dollars that come through the IGA from the grant funding that was made available from OHA over the past two years. These services will continue to be a new point of access for Jackson Care Connect members.

Mental Health Court: Jackson County Mental Health Court is a partnership between JCMH, Jackson County Courts, and the Southern Oregon Public Defenders Office. Modeled after other evidence based treatment courts, the Mental Health Court supports are available to defendants charged with a crime in Jackson County Circuit Court who have a serious and persistent mental illness that appears to be the

primary factor in the person's involvement with the criminal justice system. Mental Health Court provides a highly structured, supervised opportunity for eligible defendants to pursue mental health treatment, stability and independent well-being under intensive supervision of a multi-disciplinary team. JCMH provides the coordinator for this project and Jackson Care Connect and AllCare provide shared funding for this position.

Multi-Disciplinary Staffings: The purpose of inter-agency client staffing is to develop solutions for individuals who are struggling and slipping through the cracks of community services, as evidenced by multiple police or mental health emergency contacts, with the ultimate goal of preventing escalation of mental health symptoms and attendant crises. JCMH sponsored the formation of this group in 2012 through a subcommittee of the Public Safety Coordinating Council, and staffing's have continued to take place to the current day. This process has assisted 20 of the community's most high risk individuals in gaining stability and reducing police contact. JCMH will continue to chair this community group and serve in its capacity as convener.

Peer Support Services: Peer support is a research-based service delivered by state certified Peer Support Specialists. Peer support specialists self-identify as being in recovery from their own mental health and/or substance abuse problems; their personal experiences enable a depth of empathy and perspective that cannot be duplicated. Peers work as extra-help employees and support the clients they serve with skill development, advocacy, encouragement and assistance.

Psychiatric Support Services: Providing medication services and supports to individuals that will continue to be available for those individuals being served in our system. With the PharmBlue pharmacy now embedded in the HHS building these medications are often filled at the on-site pharmacy with the goal of increased medication compliance and better outcomes for those individuals.

Psychiatric Security Review Board (PSRB): Services for individuals under the mandate of the PSRB promote community integration for severely mentally ill persons after prolonged stays in state hospitals with the goal of moving to fully independent living situations when possible. Assessing for risk to public safety is an integral component of this work. Services include: the Hazel Center Secure Residential Treatment Facility (SRTF) run by Options which houses and treats 16 clients (8 clients under the PSRB) following discharge from the State hospital; and PSRB monitoring and supervision for up to 20 clients, living independently in transitional housing or in group homes under conditional release from the State hospital.

SERVICES FOR AGING AND PEOPLE WITH DISABILITIES (Enhanced Care):

Westwind Enhanced Care Services: Westwind is a locked residential facility for 16 adults with physical disabilities as well as serious and persistent mental illness. The program provides case management and skill building as well as psychiatric care on site every other week. There is a QMHP/Manager available for clients. The primary focus is community integration and safety so that placement can be maintained.

Older Adult Behavioral Health Specialist: 1.3 FTE is currently funded through the OABHS initiative from OHA. Those dollars are passed through to the Rogue Valley Council of Government (RVCOG) to ensure collaboration and integration with the other services available in the county for older adults and individuals with mental health issues.

12/3/18