



**2016-17 Program Year  
Consolidated Annual Performance Evaluation Report**

**for the**

**City of Medford**

**Community Development Block Grant Program**

*July 1, 2016 through June 30, 2017*

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## **CR-05 - Goals and Outcomes 91.520(a), 91.520(g)**

### **Progress the jurisdiction has made in carrying out its strategic plan and its action plan. 91.520(a)**

The 2016 program year (PY) was the second year of operation under the City of Medford 2015-19 Consolidated Plan. The City's progress in achieving its strategic plan and action plan expected goals are reflected in Tables 1 and 2.

The City exceeded expectations in providing public services other than for low/moderate income (LMI) housing benefit to persons in need of essential services with subrecipients collectively serving 103.65% of the expected number. Other areas of heightened performance included: homeless prevention at 104.58%, tenant-based rental assistance at 104.76%, and Code violation resolution at 140%. Code Enforcement overachieved by resolving seven violations when five were expected. This activity was added as an amendment to the 2016-17 Action Plan prompted by an expansion of the original demolition project scope (slums & blight on a spot basis) which completed four-of-seven, or 57.14%. The City found most violations were addressed through enforcement of the newly adopted International Property Maintenance Code (IMPC), and that the majority of blighted properties were located in LMI neighborhoods. The Receivership Ordinance aided in addressing more derelict properties owned by unresponsive parties. Both the IMPC and Receivership Ordinance were adopted by Council in December 2016. City Council action triggered a 44.44% strategic plan achievement rate with 12-of-27 resolutions in two of five consolidated plan years.

The City nearly met expected 2016 PY production of LMI affordable housing units through public infrastructure supporting development of 49 units. Housing Authority of Jackson County's (HAJC) Concord project was a 2014 project with a two-year expected completion in the 2016 PY. The one unit not reported in this category is a manager's unit that does not qualify as an LMI unit. The IDIS system shows an additional expected outcome of 64 units through HAJC's Newbridge Place project. Given the time required to develop large-scale multi-family housing complexes, this project was also funded with an expected two-year production time. The City will report performance on the Newbridge Place, 64-unit project in the 2018 CAPER.

The City was not able to meet the expected number of homeowner housing rehabilitations. HAJC rehabilitated 12-of-18 units, or 66.67%. This shortfall resulted from unexpected weather delays and the unavailability of skilled labor during peak construction. Other partial accomplishments included homeowner housing added at 66.67% and homeless persons receiving overnight shelter at 77%. The deficit in homeowner housing added occurred as a result of environmental issues with a 2016 acquisition project with Habitat for Humanity (HfH), expected to produce one unit in the 2017 PY. Providing homeless person overnight shelter fell short by 23 persons, but is expected to exceed expectations in the 2017 PY. The City views the increase in community awareness of homelessness and the bolstering of the Jackson County Homeless Task Force Continuum of Care (CoC) as pivotal, regional accomplishments to producing performance during the remaining three years of the strategic plan.

Lastly, the City's 2015 safe-to-school sidewalks project was not able to contribute results in the area of public facility or infrastructure activities other than LMI housing benefit. This project experienced cumulative delays from plan design, working with property owners on right of way purchases and easements, and procuring a contractor during a rising construction market. The project is on track for completion by the end of January 2018.

City Council appoints the Housing and Community Development Commission (HCDC) to serve as Council's advisory body on matters of the City's CDBG program. The Commission analyzes the CAPER results to identify performance gaps that may be addressed in subsequent funding years; and will provide recommendations to Council on November 16, 2017, as appropriate.

**Comparison of the proposed versus actual outcomes for each outcome measure submitted with the consolidated plan and explain, if applicable, why progress was not made toward meeting goals and objectives. 91.520(g)**

The tables on the following pages provide comparisons of expected versus actual outcomes accomplished during the 2016 PY.

**Table 1 - Accomplishments – 2016 Program Year**

Goal	Category	Indicator	Expected Outcome	Actual Outcome	Unit of Measure	Percent Complete
Affordable Housing- <i>Objective 1</i>	Affordable Housing	Homeowner Housing Rehabilitated	18	12	Household Housing Unit	66.67%
Affordable Housing- <i>Objective 2</i>	Affordable Housing Public Housing Homeless	Public Facility or Infrastructure Activities for LMI Housing Benefit	50	49	Households Assisted	98.00%
		Homeowner Housing Added	3	2	Household Housing Unit	66.67%
		Tenant-based Rental Assistance/Rapid Rehousing	21	22	Households Assisted	104.76%
		Homeless Person Overnight Shelter	100	77	Persons Assisted	77.00%
		Homeless Prevention	1,614	1,688	Persons Assisted	104.58%
Community Development - <i>Objective 1</i>	Non-Housing Community Development	Public Facility or Infrastructure Activities other than LMI Housing Benefit	100	0	Persons Assisted	0.00%
		Buildings Demolished	7	4	Buildings/S structures	57.14%
		Code Violations Resolved	5	7	Properties	140.00%
Public Services Availability - <i>Objective 1</i>	Homeless Non-Homeless Special Needs Non-Housing Community Development	Public service activities other than LMI Housing Benefit	2,410	2,498	Persons Assisted	103.65%

**Table 2 - Strategic Plan to Date (2015-19 Consolidated Plan)**

Goal	Category	5-Year ConPlan Original Funding Amount	Indicator	Expected Outcome	Actual Outcome	Unit of Measure	Percent Complete
Improve the Condition and Availability of Affordable Housing- <i>Objective 1</i>	Affordable Housing	CDBG: \$1,000,000	Homeowner Housing Rehabilitated	76	28	Household Housing Unit	36.84%
Improve the Condition and Availability of Affordable Housing- <i>Objective 2</i>	Affordable Housing Public Housing Homeless	\$24,000	Public Facility or Infrastructure Activities for LMI Housing Benefit	50	49	Households Assisted	98.00%
		Not listed in ConPlan	Homeowner Housing Added	3	2	Household Housing Unit	66.67%
		\$7,000	Tenant-based Rental Assistance/Rapid Rehousing	7	28	Households Assisted	400.00%
		\$4,000	Homeless Person Overnight Shelter	550	244	Persons Assisted	44.36%
		Not listed in ConPlan	Homeless Prevention	1,614	1,688	Persons Assisted	104.58%
Improve Living Conditions in by Addressing Community Development Projects that Improve Public Infrastructure, Public Facilities and Neighborhood Revitalization - <i>Objective 1</i>	Non-Housing Community Development	\$1,877,062	Public Facility or Infrastructure Activities other than LMI Housing Benefit	6,030	2,050	Persons Assisted	34.00%

		\$155,218 <i>(original demo project has been reallocated)</i>	Buildings Demolished	27	4	Buildings/ Structures	14.81%
		Not listed in ConPlan	Code Violations Resolved	0	7	Properties	700.00%
Improve the Ability of Low/Moderate-Income and Special Needs Populations to Become Self Sustaining - <i>Objective 1</i>	Homeless Non-Homeless Special Needs Non-Housing Community Development	\$434,025	Public service activities other than LMI Housing Benefit	7,166	5,806	Persons Assisted	81.02%

**Assess how the jurisdiction’s use of funds, particularly CDBG, addresses the priorities and specific objectives identified in the plan, giving special attention to the highest priority activities identified.**

The City of Medford’s Consolidated Plan and Action Plan call for CDBG investments to accomplish three goals. The goals and accomplishments made during the 2016 PY are referenced below:

**1) Improve the Condition and Availability of Affordable Housing.** The City allocated CDBG funds to provide zero-interest, deferred loans (through HAJC) to 12 LMI homeowners in need of rehabilitation to correct hazards and conditions affecting health and affordability. Four homes were made lead compliant, 10 brought to standard condition and 11 owners were senior citizens. Activities included repairing roofs, failing heating and plumbing systems, unsafe wiring, weatherization and other minor emergency repairs.

The City supported transitioning homeless to permanent housing and reducing the likelihood of homelessness by funding St. Vincent de Paul’s Reducing Homelessness rental assistance program. The program served 22 households consisting of 30 adults and 25 children. The City also supported foreclosure/eviction prevention through Center for Nonprofit Legal Services’ Furthering Fair Housing program. This program helped 35 individuals preserve housing. Examples include: representation of persons with disabilities before termination of Section 8 benefits, legal counsel to pursue withholding rent to effect repairs, representation of those receiving cause termination notices, aiding in reasonable accommodation requests, and providing legal advice to help maintain eviction-free records.

Two City CDBG-funded new housing projects reached completion and full occupancy in the 2016 PY. The first was an installation of fire hydrants supporting affordable housing development with HAJC. The Concord, located in the downtown core, provides permanent rental housing to 49 LMI households, including 30 female heads of household, 23 persons with disabilities and five senior citizens. The original expectation was 50 units. One of these units is set-aside for a complex manager that is not verified as LMI housing, leading to an actual outcome of 49 or 98% attainment. The second project was HfH’s land acquisition project producing two new units, both of which are now owned by single mothers; one with three children and the other with one adult son with disabilities. A third acquisition/rehabilitation of an existing unit to provide homeowner housing through HfH was not able to reach completion due to a project scope change from a multi-lot purchase that fell through during the year to a single-lot purchase of an existing blighted unit. This situation prompted the 66.67% goal attainment under this category.

Two final programs funded under this goal involved helping homeless persons transition to permanent housing. Hearts with a Mission reunified 47 youth back with their families, 13 to alternative families, five to the Safe Families host home program, and four to independent living. Maslow Project helped move 190 individuals into temporary shelter or permanent housing.

**2) Improve the Ability of Low/Moderate-Income and Special Needs Populations to Become Self-Sustaining.** Hearts with a Mission and Maslow Project provide emergency services, outreach, wrap-around case management and vital referral services. Maslow Project served a total of 1,458 individuals and Hearts with a Mission reported serving 77. It is noteworthy to make second mention of St. Vincent de Paul and Center for Nonprofit Legal Services as both improved the ability of participants to become self-sustaining. A final public service agency, Medford Senior Center, served 900 seniors with a variety of essential services and advocacy within the community. Combined, these five agencies served a total of 2,498 people during the 2016 PY.

**3) Improve Living Conditions in by Addressing Community Development Projects that Improve Public Infrastructure, Public Facilities, and Neighborhood Revitalization.** As previously summarized, the City resolved seven code violations and promoted four blighted, unsafe building demolitions which have sparked positive neighborhood revitalization. Also notable is the fire hydrants installation that supported development of the Concord 50-unit affordable housing complex which has been reported under Goal 1: Improve the Condition and Availability of Affordable Housing.

**CR-10 - Racial and Ethnic Composition of Families Assisted 91.520(a)**

**Describe the families assisted (including the racial and ethnic status of families assisted).**

**Table 3 – Assistance to Racial and Ethnic Populations by Source of Funds**

	<b>CDBG</b>
White	2,038
Black or African American	30
Asian	16
American Indian or American Native	47
Native Hawaiian or Other Pacific Islander	13
<b>Total</b>	<b>2,144</b>
Hispanic/Latino	144
Not Hispanic/Latino	2000

**Narrative**

The City invested in nonprofit agencies providing public services to LMI and special needs beneficiaries of varying race and ethnicity. Table 2 above reflects the total number served as reported in HUD's Integrated Disbursement and Information System (IDIS). A total of 2,144 people were served under the categories listed in Table 2. Among all single race beneficiaries, 144 or 6.72% were Hispanic/Latino; and 2,000 or 93.28%, not Hispanic/Latino.

Additional mixed races that were provided public services but not listed in the IDIS-generated table included: 1) 24 American Indian or Alaskan Native and White; 2) one Asian and White; 3) 38 Black or African American and White; and 4) 346 other Multi-Racial. Among the combined 409 persons/families not reported, 324, or 79.22% identified as Hispanic/Latino.

Table 2 also excludes the demographic data of those receiving a housing related benefit including new affordable rental housing and rehabilitation of existing homes. The combined served in these categories include: 1) 55 White, 2) two Asian, 3) two Black or African American, 4) two American Indian or Alaskan Native, 5) one Native Hawaiian or Other Pacific Islander, and 6) one Multi-Racial. One household among this grouping associated with Hispanic ethnicity.

## CR-15 - Resources and Investments 91.520(a)

### Identify the resources made available

**Table 4 – Resources Made Available**

Source of Funds	Source	Resources Made Available	Amount Expended During Program Year
CDBG		\$1,292,688.95	\$453,753.63

### Narrative

Resources made available and amount expended during the 2016 PY were drawn from the HUD PR26, CDBG Financial Summary Report. These amounts have been adjusted and verified by City staff. The following adjustments were made to the PR-26:

#### *Resources Made Available*

- 1) Line 1 was adjusted by \$429,906.63 for unexpended funds at the end of the previous year including: a) \$182,159.89, IDIS Activity 370, Neighborhood Infrastructure Improvements; b) \$155,218.04, IDIS Activity 369, City of Medford Demolition/Clearance of Unsafe Problem Properties; c) \$22,018.92 program income, IDIS Activity 349, ACCESS First Time Homebuyer Assistance; d) \$63,236.62, IDIS Activity 371, Program Administration; and e) \$7,273.16, IDIS Activity 376, Medford Senior Center Parking Lot Renovation Project Phase II.
- 2) Line 07 was adjusted to reflect unexpected program income totaling \$104,289.61 from IDIS Activity 388, Homeowner Repair Program; and \$155.71 from an IDIS accounting adjustment that was discovered years prior but credited in the 2015 PY.

#### *Amount Expended During Program Year*

- 1) Line 10 was adjusted by \$168,917.76 to compute the total amount subject to low/mod benefit. The following accrued expenditures were drawn from IDIS after the 90-day grace period for recording 2016-17 expenditures: a) \$4,789.40, IDIS Activity 394, City of Medford Unsafe Problem Properties Demolition and Abatement Project; b) \$574.17, IDIS Activity 392, City of Medford Code Enforcement of Blighted Properties; c) \$20,256.03, IDIS Activity 370, Neighborhood Infrastructure Improvements Project; d) \$1,809.26, IDIS Activity 383, Reducing Medford Homelessness in 2016; and e) \$141,488.90, IDIS Activity 373, Homeowner Repair Program.
- 2) Line 14 was adjusted to reflect \$20,720.38 in accrued program administration expenditures, IDIS Activity 371, that were drawn from IDIS after the 90-day grace period.

#### *Additional Edit Parameters*

- 1) Line 20 was adjusted to reflect \$164,128.36 to compute total low/mod credit. This amount included the total amount of accrued expenditures after the 90-day grace period, calculated at

\$189,638.14, minus program administration expenditures, \$20,720.38, IDIS Activity 371; and expenditures that targeted blight properties on a spot blight basis, \$4,789.40, IDIS Activity 394.

- 2) Line 28 was adjusted to include public service accrued expenditures that were drawn after the 90-day grace period in the amount of \$1,809.26, IDIS Activity 383, Reducing Medford Homelessness in 2016. This adjustment was used to compute the public services obligation.
- 3) Line 40 was adjusted by \$20,720.38, IDIS Activity 371, Program Administration, to compute total planning/admin obligation.
- 4) Line 44 was adjusted by \$104,289.61 from program income, IDIS Activity 388, Homeowner Repair Program, to compute total subject to planning/admin cap.

**Identify the geographic distribution and location of investments**

The City of Medford did not utilize target areas for distribution of CDBG funds under the 2016-17 Action Plan. However the chart below illustrates actual percentages of the allocation of expended CDBG funds excluding program administration during the 2016 PY.

**Table 5 – Geographic Distribution and Location of Investments**

<b>Target Area</b>	<b>Planned Percentage of Allocation</b>	<b>Actual Percentage of Allocation</b>	<b>Narrative Description</b>
CDBG Eligible Block Groups	N/A	12.62%	Eligible Census Tract/Block Benefit
Citywide	N/A	86.07%	LMI Individual Benefit
Citywide – Spot Blight	N/A	1.31%	Benefit Areas on a Spot Blight Basis

**Leveraging**

**Explain how federal funds leveraged additional resources (private, state and local funds), including a description of how matching requirements were satisfied, as well as how any publicly owned land or property located within the jurisdiction that were used to address the needs identified in the plan.**

The City strongly encourages a leverage component among CDBG applicants, and applications proposing leverage funds typically score more favorably through the competitive rating system. The City identifies leverage funds through its program administration reporting component. Leverage sources during the 2016 PY included HOME funds and other federal, state/local, foundations, private contributions, agency cash in-kind, private loans, program fees or dues, and in-kind donations. Excluding program administration funds, projects expending CDBG funds during the 2016 PY or 2016 completed projects that expended prior year funds, spent CDBG funds totaling \$489,334.11. These projects provided a combined leverage of \$14,500,089. Among the leverage sources, other federal funds accounted for 62.04% of the total leverage; private contributions, 12.06%; private loans, 11.03%; HOME funds, 6.90%; foundations, 4.06%; state/local funds, 3.27%; program fees/dues, 0.50%; and in-kind donations, 0.14%

**CR-20 - Affordable Housing 91.520(b)**

**Evaluation of the jurisdiction's progress in providing affordable housing, including the number and types of families served, the number of extremely low-income, low-income, moderate-income, and middle-income persons served.**

**Table 6 – Households Provided Affordable Housing Units**

	<b>One-Year Goal</b>	<b>Adjusted One-Year Goal</b>	<b>Actual</b>
Number of Homeless households to be provided affordable housing units	125	0	0
Number of Non-Homeless households to be provided affordable housing units	130	53	51
Number of Special-Needs households to be provided affordable housing units	12	12	24
<b>Total</b>	<b>267</b>	<b>65</b>	<b>87</b>

**Table 7 – Households Provided Affordable Housing Support**

	<b>One-Year Goal</b>	<b>Adjusted One-Year Goal</b>	<b>Actual</b>
Number of households supported through Rental Assistance	120	21	22
Number of households supported through The Production of New Units	64	52	52
Number of households supported through Rehab of Existing Units	18	18	12
Number of households supported through Acquisition of Existing Units	1	0	0
<b>Total</b>	<b>201</b>	<b>91</b>	<b>86</b>

**Discuss the difference between goals and outcomes and problems encountered in meeting these goals.**

The One-Year Goal column in Table 5 reflects numbers recorded in the 2016-17 Amended Action Plan. These numbers include those expected to be provided support services to obtain affordable housing. After confirming with HUD and per 91.520(b), goal totals should include production of new housing units, only. The Adjusted One-Year Goal column reflects accurate expectations for the PY. Per HUD direction, any adjustment to or misinterpretation of expectations may be explained through the 2016-17 CAPER.

The City was not able to predict how many homeless persons would be provided new housing accommodations through the CDBG program. Although 125 were expected to be provided support services leading to housing, the adjusted one-year goal is zero due to the tenant and owner selection process of the two subrecipients producing new affordable housing units. HAJC uses a lottery-style

tenant selection process and HfH maintains a more complex screening process for homeownership including classes, in-kind labor and sustainable income. Although housing was made available to 27 homeless individuals through rental deposits, no homeless households were placed in newly produced affordable housing through the CDBG program.

The 130 non-homeless households to be provided affordable housing originally included 64 rental units through a 2016 infrastructure-funded project, and rental assistance. Larger-scale affordable housing construction projects are now given a two-year completion window. The adjusted, expected goal is 53 new units, including 50 rental units and three owner units. Projects contributing to the 51 actual units serving non-homeless, low-income residents included HAJC's 2014 Concord; 49 units; and HfH's 2013 Mellecker project; 2 units. HAJC sets aside one manager unit at the Concord that is not reported as an LMI unit. HfH was granted a substantial amendment from multi-lot acquisition to single-unit blighted property acquisition/rehab. This unit contained asbestos and lead resulting in an environmental delay. The property was acquired on July 7, 2017. Complexities of these types of projects have prevented completion in one PY and typically require 18 to 30 months depending upon the magnitude of the scope, market conditions and environmental issues.

In conclusion to Table 5, the expected number of special-needs households to be provided affordable housing was underestimated at 12. HAJC's Concord property provided housing to 23 tenants with disabilities.

Table 6 illustrates an overestimation in the number of households expected to receive rental assistance. The original 120 households was actually the number expected to be served in Jackson County. The number of Medford households presented by St. Vincent de Paul was 21, which was exceeded by one.

The 64 units recorded under households supported through production of new units reflect the 2016 HAJC Newbridge Place project which is expected for completion in the 2018 PY. The adjusted number of 52 units was achieved through HAJC's Concord project and HfH's Mellecker homes project.

The amended 2016-17 Action Plan reports an expected 18 homeowners to receive rehabilitation assistance. The City fell short of this goal at 12 units due to weather conditions, a labor shortage and contractor schedules.

The final category of acquisition of existing units was expected to produce one homeowner unit through the purchase of one blighted home. As previously referenced, HfH purchased this unit in July 2017 after environmental delay associated with asbestos and lead.

### **Discuss how these outcomes will impact future annual action plans.**

The City's actual accomplishments as compared to the one-year projected goals were impacted by staff understanding of the numbers to be recorded under this section of the action plan. Errors in the initial recording are reflected in Tables 5 and 6 and explained above. Other discrepancies were prompted by the complexities of affordable housing development. The HAJC's Newbridge Place, which will provide 64 new rental units for low-income households, is marked for completion in 2018. City staff expects more precise reporting in future actions plans that may be impacted by factors explained herein. The City remains prepared to work through unavoidable delays impacting the outcomes of

similar future projects that will most likely occur from complex governmental funding requirements and grant cycles, extensive planning activities and complex environmental reviews.

**Include the number of extremely low-income, low-income, and moderate-income persons served by each activity where information on income by family size is required to determine the eligibility of the activity.**

**Table 8 – Extremely Low- and Low-Income Persons Served**

<b>Number of Persons Served</b>	<b>CDBG Actual</b>	<b>HOME Actual</b>
Extremely Low-income	27	n/a
Low-income	50	n/a
Moderate-income	42	n/a
<b>Total</b>	<b>119</b>	<b>n/a</b>

**Narrative Information**

As reflected in Table 7, the City provided affordable housing assistance to 119 persons or households consisting of 27, or 22.70% extremely low-income; 50, or 42.01% low-income; and 42, or 35.29% moderate-income. Agencies that yielded these results included HAJC, St. Vincent de Paul, and HfH.

**CR-25 - Homeless and Other Special Needs 91.220(d, e); 91.320(d, e); 91.520(c)**

**Evaluate the jurisdiction's progress in meeting its specific objectives for reducing and ending homelessness through:**

**Reaching out to homeless persons (especially unsheltered persons) and assessing their individual needs.**

During the 2016 PY, the City awarded \$77,000, or 81% of the allowable CDBG public services allocation to the following nonprofit agencies providing outreach and/or support services to homeless persons and their families:

St. Vincent de Paul – The Reducing Medford Homelessness program provided rent deposits and monthly rent subsidies to families and individuals that were homeless or at risk of becoming or returning to homelessness. CDBG funds of \$25,000 served 22 households consisting of 30 adults and 25 children. Beneficiaries included 27 persons that were homeless at the time of service, 15 female heads of household, six persons with disabilities and three senior citizens. St. Vincent de Paul is an all-volunteer organization dedicated to providing compassionate support and care to those persons experiencing or at risk of homelessness. Other services included: emergency family shelter, lunches, groceries, health screenings, emergency dental care, showers, laundry, haircuts and mail boxes.

Maslow Project – The Wrap-Around Supportive Services for Homeless Youth and Families program was supported with \$22,500 CDBG funds to supplement a portion of staff expense to serve 1,458 unduplicated eligible clients through the Medford Resource Center. Of these clients, 1,139 were homeless when they entered the program, and the remaining 319 were at extreme risk for homelessness or on a six month exit-plan after being housed. Services included street outreach, food services, case management, and connections to other services such as SNAP benefits; children's dental clinic; crisis intervention counseling; harm reduction/life skills; tutoring and mentoring; transitional services designed to find housing, pursue continuing education, training or employment opportunities; and connection to adult role models and mentors. Of the 1,458 served through CDBG, 419 were female heads of household, 117 were persons with disabilities and one was a senior citizen.

Hearts with a Mission – The Shelter and Safety Net Services program received \$17,500 CDBG funds to provide shelter, case management, counseling and educational support to 77 unduplicated youth. Combined, these youth benefited from a total of 4,734 nights of safe sheltering and approximately 13,700 healthy meals and snacks. The City's CDBG award supplemented the cost of the agency's Shelter Coordinator, allowing for the on-going development of support and services. The coordinator facilitated education around healthy eating and brainstormed with youth and staff, which resulted in a plan to provide healthier options and build healthy lifestyles. Other services included family reunification and/or matching youth with host families. Among the 77 served through the CDBG program, 40 were female heads of household.

Center for Nonprofit Legal Services – The Furthering Fair Housing program was awarded \$12,000 to cover legal staffing costs associated with outreach and legal education to protected classes. Among the 35 served, five were homeless at the time of service. Many of those served that did not identify as homeless were struggling to maintain transitional or permanent housing. CFNPLS participated in the annual homeless outreach event (Project Community Connect) at which connection was made with 20 participants.

### **Addressing the emergency shelter and transitional housing needs of homeless persons.**

As referenced above, \$17,500 CDBG public service funding was awarded to Hearts with a Mission; licensed through Oregon Department of Human Services as a child caring agency, to provide 16 emergency beds and 10 host home transition beds to homeless and transitional youth. The year-round shelter provided 77 youth with a total of 4,734 nights of safe shelter or host home accommodations. In addition to meeting the emergency and transitional housing needs of participants, Hearts with a Mission provided referral services that will help these youth build self-sustaining lives.

### **Helping low-income individuals and families avoid becoming homeless, especially extremely low-income individuals and families and those who are: likely to become homeless after being discharged from publicly funded institutions and systems of care (such as health care facilities, mental health facilities, foster care and other youth facilities, and corrections programs and institutions); and, receiving assistance from public or private agencies that address housing, health, social services, employment, education, or youth needs.**

All six of the public services agencies receiving a total of \$94,959 in 2016 CDBG funds targeted low-income individuals and families at risk of becoming homeless. The services provided by St. Vincent de Paul, Hearts with a Mission, Maslow Project and Center for Nonprofit Legal Services were individually summarized. Collectively, these four agencies served 1,604 clients with direct services to avoid homelessness. Among the 55 served by St. Vincent de Paul, 28 were low-income individuals that received rent subsidies to prevent becoming homeless. Many of the youth served by Hearts with a Mission and Maslow Project were either homeless or at extreme risk of becoming homeless after being discharged from foster care, corrections programs and/or other youth facilities. Hearts with a Mission reported a 21% discharge rate from DHS, 4% from hospitals, 6% from schools, 5% from churches, 15% from family or friends, 21% from other community agencies, and 28% as self-referred. Center for Nonprofit Legal Services served 30 participants that were not homeless, but seeking services to avoid homelessness from exposure to potential fair housing discrimination. As referenced by the agency's fair housing attorney, often times, communication from the agency is sufficient in addressing potential issues that could result in homelessness. The agency provided legal-related services to 35 clients. Trainings on preventing and ending homelessness were also provided during community events that indirectly impacted performance in this area.

Two additional agencies including Community Volunteer Network and Medford Senior Center provided services that helped participants secure or sustain income and/or manage personal budgets to maintain housing.

Community Volunteer Network's Foster Grandparent Program received \$9,000 CDBG funds to support staff wages that aligned 28 seniors with after school programs at elementary schools and day facilities serving preschoolers. Foster grandparents received a stipend of \$2.65/hour, which on more occasions than not, helped seniors living on very little income maintain housing. Total stipends paid out to seniors during the 2016 PY were reported at \$85,166.01. Program services extended supplemental benefits to the parents or guardians of the youth served by helping them secure after school care vital to maintaining employment and housing.

Medford Senior Center served 900 seniors during the 2016 PY through the Senior Advocacy Program. The City invested CDBG funds in the amount of \$8,959 to underwrite operational expenses associated with staffing. Relevant services included assistance with personal budgeting, obtaining benefits, and referrals to secure housing subsidies that allow these individuals to avoid homelessness. Many seniors were discharged from health care facilities and required ongoing assistance with prescriptions, transportation to medical appointments and health screenings.

HAJC's Concord complex marked 13 of the 50 units with a preference for individuals with intellectual and developmental disabilities in partnership with Pathway Enterprises. These individuals are low-income, some of whom have transitioned out of health care facilities, group homes, or were living with their families. Providing housing to these individuals is allowing them to live independently rather than being placed in institutions, foster care or health care facilities.

**Helping homeless persons (especially chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth) make the transition to permanent housing and independent living, including shortening the period of time that individuals and families experience homelessness, facilitating access for homeless individuals and families to affordable housing units, and preventing individuals and families who were recently homeless from becoming homeless again.**

Although several agencies assisted homeless persons with services that may impact their ability to transition to permanent housing, the City identified three agencies as providing direct transitional assistance during the 2016 PY: 1) Maslow Project's Wrap-around Case Management for Homeless Youth and Families Program received \$22,500 to help place 190 individuals into temporary shelter or permanent housing; 2) St. Vincent de Paul received \$25,000 to transition 11 families or 27 persons out of homelessness into permanent rental housing; and 3) Hearts with a Mission received \$17,500 to reunify 47 youth back with their families, 13 to alternate families, five to the Safe Families host program and four to independent living. Lastly, HAJC's Concord has provided 13 individuals with intellectual and developmental disabilities the opportunity for independent living through partnership with Pathway Enterprises.

### **CR-30 - Public Housing 91.220(h); 91.320(j)**

#### **Actions taken to address the needs of public housing.**

There are no public housing projects or units of public housing in Medford.

#### **Actions taken to encourage public housing residents to become more involved in management and participate in homeownership.**

There are no public housing projects or units of public housing in Medford.

#### **Actions taken to provide assistance to troubled PHAs.**

There are no troubled PHAs operating in Medford.

### **CR-35 - Other Actions 91.220(j)-(k); 91.320(i)-(j)**

#### **Actions taken to remove or ameliorate the negative effects of public policies that serve as barriers to affordable housing such as land use controls, tax policies affecting land, zoning ordinances, building codes, fees and charges, growth limitations, and policies affecting the return on residential investment. 91.220 (j); 91.320 (i)**

The City began its five-year consolidated plan period with a strong approach to addressing affordable housing barriers through increased collaboration among the City, nonprofit developers and services providers, private developers, and the CoC. The City continued to strengthen this approach in 2016-17 by co-sponsoring the winter series that took a cross-sector approach to educating, increasing awareness, and engaging key stakeholders, leaders and elected officials. Medford became a more collaborative, solutions-based community. The following are examples of City actions taken during the 2016 PY:

- 1) Addressed available land supply and density maximums that limit the number of units buildable on a given parcel of land through amendment of the Urban Growth Boundary (UGB). On August 18, 2016, City Council adopted Council Bill 2016-99; an ordinance adopting the UGB Amendment, which included over 1,000 acres for residential purposes and over 600 acres for commercial and industrial purposes.
- 2) Approved a zone change in April 2017 from MFR-20 to MFR-30 on 4.5 acres. The subject property, referred to as Weatherly Court, will serve our city's growing senior population with 98 new independent living opportunity housing units.
- 3) Council approved Bill 2016-140, a resolution designating a portion of City-owned property at 821 N. Columbus Avenue as a campground to provide transitional housing accommodations under the terms of ORS 446.265. Council also approved Bill 2016-141, an ordinance authorizing a contract with Rogue Retreat to manage a transitional housing campground located on said property, named Hope Village. Both bills were approved on November 17, 2016. This

action created an avenue for homeless individuals to transition to permanent housing through accommodations and accompanying case management services.

- 4) City staff began drafting land use regulations to permit the use of transitional housing through smaller units referred to as transitional housing villages. The intent is to provide a structure for agencies seeking to construct a transitional housing village. Using the *Housing First Model* as a framework, the City drafted standards that regulate the design, organization, operations, safety and maintenance of these villages. Public hearings are positioned to begin spring 2018.
- 5) City staff made significant progress addressing abandoned, unsafe problem properties through Council adoption of the International Property Maintenance Code (IPMC) and Receivership Ordinance in December 2016. These tools triggered property owners to address code violations using minimal CDBG and/or General Fund dollars. Efforts also stimulated public/private partnerships that increased the potential of strengthening the city's housing stock by improving or replacing these units.
- 6) The HCDC passed a motion on November 2, 2016 to prioritize CDBG applications supporting permanent supportive housing in the 2018-19 PY. This action provided a funding advantage and sought to strengthen the City's investments in other areas associated with housing development.
- 7) Council approved Substantial Amendment to the 2016-17 Action Plan on June 1, 2017, authorizing additional CDBG investment of \$143,478 to the HAJC's 64-unit project experiencing an unexpected, statewide funding gap related to devaluation of low-income housing tax credits. This action helped HAJC maintain state funding in a highly competitive arena impacted by a decline in available tax credit allocations.

#### **Actions taken to address obstacles to meeting underserved needs. 91.220(k); 91.320(j)**

Funding is a primary obstacle in providing critical services to underserved populations including those experiencing homelessness, senior, minority ethnic groups, at-risk youth, veterans, extremely low- and low-income individuals, and persons with disabilities. Helping underserved populations reach a new level of self-sustainability requires access to critical emergency services, continued wrap-around case management and access to permanent affordable housing. The City prioritized the most underserved populations during the 2016 PY through maximum allocation of entitlement dollars to public service agencies meeting underserved needs.

Sections CR-20 and CR-25 of this report demonstrate the City's commitment to providing resources to agencies that helped the City yield the following results: 1) improvement of 12 existing owner-occupied affordable housing units; 2) completion of a 50-unit affordable housing complex prioritizing low-income and special needs households; 3) completion of two new owner-occupied units, both serving female head of households with multiple children including one adult child with a disability; 4) emergency shelter to 77 homeless youth; 5) homelessness prevention assistance in some capacity (either direct or indirect) to 1,688 individuals; 6) mentorship of area youth through the Foster Grandparent program utilizing 28 volunteer seniors receiving small stipends to help with monthly expenses; and 7) Support services and/or housing related services to 376 persons with disabilities,

1,022 FHOH, 951 senior citizens, 1,563 youth (that were recorded), 324 persons identifying as Hispanic or Latino, 1,775 reporting  $\leq 30\%$  AMI, 362  $\leq 50\%$  AMI, and 480  $\leq 80\%$  AMI.

The City faces the ongoing obstacle of limited staff time and resources required to build community systems that can proactively address both immediate and emerging priority needs. The City's heightened collaboration during the 2016 PY established a foundation for more accurately addressing the needs of its residents, service providers, and nonprofit and profit developers. Consultation with HUD staff, including Sally Luken, HUD's technical advisor to this region on homelessness and the CoC, strengthened the City's integrated outlook and strategies. The winter series on homelessness and affordable, fair housing sparked collaboration and a stronger CoC. In addition to supporting community collaboration, the City through new leadership and its elected officials has begun to take a "champions" role in addressing homelessness and the obstacles this population faces. The City expects significant progress during the remaining three consolidated plan years.

### **Actions taken to reduce lead-based paint hazards. 91.220(k); 91.320(j)**

The City's Five-Year Consolidated Plan identified an extensive need for rehabilitation programs in Medford targeting the improvement of the City's oldest housing stock. Consolidated planning data directed attention to the 51% of owner housing and 52% of rental housing built prior to 1980 as potential lead-based paint hazards. Data also concluded 13% of owner housing units and 7% of rental units built prior to 1980 are occupied by families with children; a combined 3,100 units. The City has remained committed to addressing this issue since 1996 through partnership with HAJC, the administrative agency for the City's Homeowner Repair Program. Since inception, the program has rehabilitated approximately 428 homes and delivered nearly \$4 million of benefit to the City of Medford's LMI homeowners. As of June 30, 2017, HAJC recorded approximately \$2.1 million in loans outstanding, which may come back as program income to benefit additional homeowners.

HAJC provides all homeowners participating in the Homeowner Repair Program with information about lead-based paint hazards during program orientation. Compliance with lead paint regulations and applicable housing quality standards are verified through inspection prior to initiating rehabilitation work. HAJC's rehabilitation specialist requires all program contractors maintain proper certification with the Contractor's Construction Board. The program also requires lead-based paint assessments be conducted on at-risk homes with children present. Among the 12 homes rehabilitated in the 2016 PY, 11 were built prior to 1980. HAJC reported 10 of these homes were in substandard condition prior to rehabilitation, and four involved lead disturbance and compliance.

The City's Consolidated Plan also identifies expanding the stock of lead safe housing units through housing initiatives as a strategy to addressing lead-based paint hazards. The City is actively supporting the production of new affordable owner and rental housing units through investment of CDBG dollars. HAJC completed its 50-unit affordable housing complex in the 2016 PY with the help of \$24,000 in 2014 CDBG funds. An additional \$343,478 was allocated to a 2016 project that is expected to produce 64 new units during the 2018 PY. HfH completed construction of two new owner-occupied homes during the 2016 PY and received additional CDBG funds for acquisition/rehabilitation of a blighted home containing lead and asbestos that will be brought to lead compliance and standard condition for homeownership in the 2017 PY.

### **Actions taken to reduce the number of poverty-level families. 91.220(k); 91.320(j)**

The City's actions to reduce the number of poverty-level families during the 2016 PY primarily consisted of supporting nonprofit agencies providing social services to poverty-level families, and improving the availability and affordability of housing for homeowners, renters and individuals seeking to transition out of homelessness.

**Public Service Availability** - Five public service agencies receiving CDBG support during the 2016 PY worked to reduce the immediate and/or future poverty-level of those served. Families received assistance with foreclosure/eviction prevention, rental preparedness and fair housing awareness, senior advocacy, family reunification, safety net services, referral services, education attainment, food, comprehensive case-management, mentorship, transition out of homelessness, and housing accommodations. Investing \$94,959 in public services referenced under CR-05 provided assistance to 2,498 families or individuals to help manage or overcome poverty. This total directly represented non-housing related services. An additional 55 individuals were served with rental assistance funds, which also reduce the side-effects of poverty.

**Affordability of Owner-Occupied Units** - The City's Homeowner Repair Program served 12 LMI homeowners with housing repairs and weatherization assistance that not only allowed them to remain in their homes, but for several will result in a reduction in monthly utilities costs and improved health. Eleven of these homeowners were seniors on limited and/or declining incomes. HfH completed construction of two homes that benefited single mothers seeking to avoid a life of poverty for their children.

**Availability of Affordable Rental Units** - The City encourages nonprofit affordable housing developers to seek funding leverage through the CDBG program. During the 2016 PY, HAJC completed construction of the 2014 CDBG-funded Concord, which now provides permanent rental housing for 12 households  $\leq$  30% AMI and 37 households  $\leq$  60% AMI. The project is supported by HUD's project-based voucher program, which limits rent to 30% AMI for 12 families combating poverty. The Concord is located close to social services, the RCC and SOU Higher Education Center, WorkSource Rogue Valley/The Job Council, Medford Library, churches, schools, YMCA, convenience stores, a pharmacy, a food pantry, three parks, and Rogue Valley Transit District's Front Street Transfer Station; all of which help poverty-level families or families at risk of poverty live more self-sustainable lives.

### **Actions taken to develop institutional structure. 91.220(k); 91.320(j)**

Medford residents are fortunate to live in a community that is comprised of a network of social service agencies that work together to develop a comprehensive system for the delivery of support services. The City strives to strengthen this institutional structure on an annual basis through CDBG and local funding. The City's role in improving institutional capacity during the 2016 PY focused on: 1) continuing to play an integral role in reducing homelessness through heightened involvement with the CoC; and 2) providing technical assistance to agencies including ACCESS, HfH, Hearts with a Mission, HAJC, Maslow Project, Hearts with a Mission, Center for Nonprofit Legal Services, St. Vincent de Paul, Rogue Retreat and PeopleFirst Properties to help achieve consolidated plan goals through collaborative community leveraging and project development. The City anticipates future funding requests will focus on providing permanent supportive housing for individuals experiencing

homelessness and affordable housing development for LMI households. City staff will continue to work with public agencies to ensure future projects are CDBG eligible.

**Actions taken to enhance coordination between public and private housing and social service agencies. 91.220(k); 91.320(j)**

The City's HCDC is charged with acting as advisor to Council on matters affecting housing and community development. Throughout the program year, the HCDC sought input from various public and private housing and social services agencies in efforts to understand the needs of homeless, LMI, and special needs populations to develop new or enhanced programs, and review opportunities to address homelessness and housing affordability. Collaborations throughout the year included:

On August 3, 2016, the HCDC initiated a meeting with HUD representative Connor McDonnell and Sally Luken of Luken Solutions to learn more about HUD's initiative to end veteran homelessness. Jackson County was experiencing difficulty meeting specific federal benchmarks of the recent \$6 million SSVF grant awarded to ACCESS to end veteran homelessness. A housing shortage was identified by HUD, the HCDC and service providers as a significant barrier to meeting these benchmarks. The HCDC learned why and how HUD was providing the region technical assistance through Sally Luken to help spark positive change. Ms. Luken was also working to help strengthen the CoC.

On October 5, 2016, James Raison with ACCESS gave a presentation to the Commission on ending veteran homelessness in Jackson County. Mr. Raison focused his presentation on an explanation of the main problems meeting benchmarks and spending grant funds. Problems included low vacancy rates, high rents, regulations prohibiting funding capital projects, timeliness concerns and the high number of veterans experiencing homelessness. Recommended possible solutions included CDBG prioritization of veterans housing and leveraging CDBG funds to acquire and renovate a hotel. Mr. Raison concluded with an official request to prioritize CDBG program funding to target veteran housing. The HCDC passed a motion to approve assigning bonus points to 2017-18 CDBG grant applications that provide permanent supportive housing services or propose to produce permanent supportive housing units. Ten points would be added to the total scores of applications addressing this immediate community housing need. The Commission made a decision not to limit prioritization to the veteran subpopulation, only.

Shortly after, the City co-sponsored a public awareness winter series with HUD, ACCESS and the HTF through the services of Luken Solutions. The first workshop in December 2016 increased awareness of the Housing First Model. In January 2017, the Six Steps to Gaining Acceptance of Affordable Housing was introduced: 1) Create a core team of stakeholders; 2) Develop a political strategy; 3) Build local support; 4) Notify the community and develop good neighbor agreements; 5) Understand organization and tenant rights and prepare a legal strategy; 6) Create a media and communications strategy. February's session helped identify community partners interested in developing a 6-Step Toolkit to assist nonprofit developers introduce shovel-ready, affordable and fair housing projects. The fourth event was a community forum held in March to increase awareness and drive affordable housing support as well as poll opinions of affordable housing barriers. This initiative helped streamline awareness, engage elected officials and private developers, and spark a new City initiative to align the CoC with the City's Consolidated Planning process and participate in the restructuring of the governance of the CoC.

**Identify actions taken to overcome the effects of any impediments identified in the jurisdictions analysis of impediments to fair housing choice. 91.520(a)**

Progress made to address impediments identified in the City's 2015 Analysis of Impediments (AI) includes:

- 1) *Housing Affordability related to Insufficient Income:* The City maintained annual sponsorship of Southern Oregon Regional Economic Development, Inc. (SORED). The City's sponsorship assisted SOREDI in inviting and educating prospective companies that have expressed interest in relocation or expansion opportunities in the Medford area.
- 2) *Increased public awareness of fair housing rights:* As referenced above under "Actions taken to enhance coordination between public and private housing and social service agencies (91.22(k); 91.320(j))," the City's efforts to increase public awareness through the four-part winter series addressed fair housing under Step 5, which is directed to understanding organization and tenant rights and prepare a legal strategy. Fair Housing will also be a key element of the 6-Step Toolkit also referenced herein.
- 3) *Increased efficiency of public transportation and mobility:* Rogue Valley Transit District (RVTD) gained a 13-cent tax levy in May 2106. As a result, Route 25 to southwest Medford was added and headways in existing Route 30 in west Medford were increased. Title VI analysis shows a 13% higher low-income populations and 12% higher minority populations living within a ¼ mile of Routes 25 and 30. Opportunity for these populations to use transit was increased by 30%. RVTD also restored evening and Saturday routes.
- 4) *Impacts of the subprime mortgage lending crises and increased foreclosures:* The City utilized \$131,009 in NSP program income during the 2016-17 PY. The full amount was granted to Habitat for Humanity to acquire and partially rehabilitate 851 Humphrey Street in Medford.
- 5) *Predatory lending and other industry practices:* The City funded the Credit Report Counseling Services for Low-Income Community Members Program during the 2017-18 PY with intention of exploring lending practices through the expertise and networking capacity of Consumer Credit Counseling. CDBG funds will be allocated to run credit reports for LMI individuals working through barriers to obtaining employment, and securing housing and transportation. Highlights to this new relationship include: 1) Consumer Credit has secured additional leverage funds from US Bank; 2) five of the agency's board members are bank executives; and 3) discussions between Consumer Credit, the City and lending institutions will take place in 2018.
- 6) *Barriers to fair housing choice impacts on special needs populations:* The City's CDBG-funded Concord sets aside 13 units for individuals with intellectual and developmental disabilities in partnership with Pathway Enterprises.
- 7) *Limited resources to assist lower-income, elderly and indigent homeowners to maintain their homes and stability in neighborhoods:* The 2015-19 Consolidated Plan reports that elderly account for 39.85% of homeowners experiencing housing cost burden >30% and 38.9% of homeowners experiencing burden >50%. Many of Medford's elderly live in aging housing stock; and without homeowner assistance may be forced out of substandard housing into nursing homes. To remedy this,

the City funded the Homeowner Repair program. Of the 12 households served, 11 were elderly. Ten of these homes were built prior to 1978 and nine were substandard.

#### **CR-40 - Monitoring 91.220 and 91.230**

#### **Describe the standards and procedures used to monitor activities carried out in furtherance of the plan and used to ensure long-term compliance with requirements of the programs involved, including minority business outreach and the comprehensive planning requirements**

Monitoring of all activities funded under the CDBG program is carried out on an ongoing basis by the City's CDBG program administrative staff. Quarterly updates and financial reports are required of all subrecipients who include both public service programs and capital improvement projects receiving CDBG funds. Subrecipients are also required to submit a grantee performance report with each reimbursement request. This report allows staff to monitor expected outcomes with actual program results. The City collects current lists of Board of Directors; and records are maintained for a minimum of five years. The City collects a notification of single annual audit from all agencies receiving CDBG funding. Audit tracking is maintained to ensure subrecipient's compliance with OMB circular A-133. All projects are administered under procurement standards governed by OMB Circular A-110 for non-profits and all capital improvement projects adhere to Federal Labor Standards.

During the 2016 PY, onsite monitoring visits were conducted with Center for Nonprofit Legal Services, Hearts with a Mission and St. Vincent de Paul. Program eligibility was reviewed which included but was not limited to beneficiary income verification, review of participant files, program operations, agency policies and procedures, employee and volunteer qualifications, and recordkeeping and accounting practices.

Center for Nonprofit Legal Services' monitoring outcome concluded the agency should ensure each potential program client's income is verified by adding an income certification section to the agency's intake form. The agency responded with verification in addition to implementing a template letter which clearly indicates the requirement of providing proof of income at the first appointment. Poverty guidelines used for verification are well-within HUD income limits.

Hearts with a Mission received heightened scrutiny in April 2017 when the Board of Directors made a decision to refer a donation from the United Methodist Church to another nonprofit from the proceeds of the Portland Gay Men's Chorus' March 2016 event in Grants Pass. CDBG staff conducted an onsite monitoring to address local concern of potential discriminatory accusations. After lengthy discussion of the agency's mission, vision, anti-discrimination policy, gift acceptance policy, and after services and accommodations for all populations including members of the LGBTQ community were verified; City staff concluded program and shelter operations to be in compliance.

St. Vincent de Paul has implemented an intake process including pre-screening, household size, income and asset verification, rental assistance records and demographic information. The City requested a client signature line be added to the income verification form. Verification of rental assistance is complete.

Compliance with lead paint regulations and applicable housing quality standards are primarily verified through the City's Homeowner Repair Program administered by HAJC. Compliance is met through

inspections conducted prior to the provision of assistance, and then again during and after construction of all rehabilitation projects where regulations apply. HAJC's housing rehabilitation specialist provides homeowners with educational information about lead-based paint during the process.

The City completed lead and asbestos surveys on an existing housing unit funded for acquisition and rehabilitation at 1026 W. 10<sup>th</sup> Street, and two blighted structures marked for potential demolition and/or clearance at 1615 Thomas Rd. and 517 Edwards. Traces of asbestos and lead were found at all three sites. The W. 10th Street and Thomas Rd. projects will be completed during the 2017 program year, and the Edwards project was not able to proceed due to financing barriers.

## **Citizen Participation Plan 91.105(d); 91.115(d)**

### **Describe the efforts to provide citizens with reasonable notice and an opportunity to comment on performance reports.**

The City of Medford developed a Citizen Participation Plan under the 2015-2019 Consolidated Plan to assure citizens are presented with opportunity to provide input and be informed of program performance. During development of the Plan, the City solicited community discussions, collaborative nonprofit agency meetings, and one-on-one discussions with citizens and private businesses to identify community needs, resources and services available, and potential barriers to development. The 2015-19 Consolidated Plan was adopted by Council, under Resolution No. 2015-46, at a public hearing held on May 7, 2015 following a 30-day public comment period.

Notifications of all public comment periods and public hearings associated with the City's CDBG program are advertised in the Mail Tribune, on the City's website and by email to interested parties. Draft documents are made available on the City's website, at the City Recorder's office and the Planning Department.

The HCDC holds meetings monthly and as deemed necessary to solicit public feedback and formulate recommendations to Council. Minutes of all public meetings held for purposes of planning for the use of CDBG funds, evaluating performance of the program, and soliciting public comments are recorded and maintained through the City Recorder.

Below is a summary of participatory actions related to the 2016-17 PY:

- A public hearing was held on May 5, 2016 to solicit public comment and obtain Council approval of the 2016-17 Action Plan, which was adopted under Resolution No. 2016-57.
- A public hearing was held on June 1, 2017 to solicit public comment on a Substantial Amendment to the 2016-17 Action Plan, which was adopted under Resolution No. 2017-54.
- A 15-day public comment period to consider the draft version of the 2016-17 CAPER was opened on November 1, 2017 and closed on November 16, 2017. Two comments were received by email.

Comment No. 1: "As a citizen, I'm proud to live in a city so actively, as demonstrated by the work represented in this CAPER, caring for *all* its residents, especially those who are most vulnerable among us. I am impressed by the City's careful planning and monitoring of projects resulting in course corrections and process improvements as the work moved forward. I appreciate the priorities this work represents, the attention to opportunities to be of service, and on developments taking place and taking an active role in leveraging them. In particular I appreciate the City's recognition of the importance of the Continuum of Care noted in this report and all the homes that the City helped create, stabilize and make safe. My heartfelt thanks to staff and volunteers who have done this quality work" (Sanderson, J., 11/16/17)

Comment No. 2: “Thank you for sending the report. Just to correct an inaccuracy in the report: Hearts with a Mission received heightened scrutiny in March **April** 2017 when the Board of Directors made a decision to decline **refer a donation from the United Methodist Church to another non-profit** from the proceeds of the Portland Gay Men’s Chorus’ December **March** 2016 event in Grants Pass. Not a big deal, but if you want the actual timeline, and accuracy, it should read as I highlighted. Thank you again for all your help and assistance” (Lamson, K., 11/17/17).

- City staff presented the 2016-17 CAPER under Ordinances and Resolutions at the Council meeting held at Medford City Hall, Council Chambers, on Thursday, November 16, 2017 at 6:00 p.m. No individuals or agencies were recorded as attending the meeting with intent of providing public comment. Council adopted the 2016-17 CAPER under Resolution No. 2017-133.

## CR-45 - CDBG Misc. 91.520(c)

### **Specify the nature of, and reasons for, any changes in the jurisdiction's program objectives and indications of how the jurisdiction would change its programs as a result of its experiences.**

The City's original demolition project, which was allocated \$155,218 during the 2015 PY to address blighted, unsafe properties on a spot blight basis was expanded and reallocated after Council adopted the International Property Maintenance Code (IPMC) and Receivership Ordinance in December 2016. Necessary, but lengthy delays prompted the HCDC, serving in an advisory capacity to Council on all CDBG matters, to recommend the original project be evaluated for reallocation. Reallocation was recommended not only to remediate timeliness concerns, but also redirect CDBG funds back to one of the City's Consolidated Plan priority goals of increasing and improving the city's affordable housing stock. City Council demonstrated their support of this recommendation on December 15, 2016 by approving a resolution adopting a supplemental budget for the 2015-17 biennium that included funding receivership activities with \$100,000 from the City's General Fund. The Receivership Program was established to cover demolition costs that were originally marked for payment through the CDBG program. Final reallocation of the original \$155,218, plus \$1,669.40 in unused CDBG program administration funds was approved by Council through a Substantial Amendment to the 2016-17 Action Plan on June 1, 2017. The following reallocation was approved:

- 1) City of Medford - Unsafe Problem Properties Demolition and Abatement (spot blight): \$4,798.40 - IDIS# 394;
- 2) City of Medford Public Works Demolition Thomas Road: \$50,000 - IDIS #369;
- 3) City of Medford Code Enforcement of Blighted Properties (LMA): \$7,089 - IDIS #392;
- 4) 4) PeopleFirst Properties Rental Rehab (blighted property at 128 Chestnut): \$25,000 - IDIS #393; and
- 5) 5) HAJC's Newbridge Place Multi-Family Housing Infrastructure (new rental units at 217 N. Ross Lane): \$70,000 - IDIS #389.

This reallocation served many CDBG objectives including addressing slums and blight, soliciting cross-sector partnership, and helping fill a state-wide funding gap created by a devaluation of Low-Income Housing Tax Credits. The City found the process of addressing blighted properties through policy to be initially effective without utilizing significant CDBG funding. Code Enforcement and Building staff worked directly with property owners to assist with the legal requirements of bringing their properties up to Code. Four property owners carried out demolition of unsafe structures with private funds, prior to any legal proceedings; while seven resolved code violations through enforcement of the IPMC. In addition, CDBG staff fostered connections between potential nonprofit developers interested in acquiring properties for affordable housing reuse. One partnership formed outside of the CDBG arena, yet fostered by its efforts is expected to produce six new, cottage-style homeowner units and prevented a senior woman from falling into foreclosure and bankruptcy.

Both the PeopleFirst rental rehabilitation project and HAJC's 64-unit affordable housing complex are expected for completion in the 2017 PY and 2018 PY, respectively. The public-private partnership with PeopleFirst Properties and ACCESS was cultivated during the City co-sponsored winter series on homelessness and affordable housing. This new partnership resulted in a pilot project that will be evaluated by the HCDC for potential subsequent project development. Co-sponsoring the winter series was also a direct reflection of the City's objective of increasing awareness of the importance of cross-sector partnerships and supporting the capacity of its nonprofit service providers and developers.

**Does this Jurisdiction have any open Brownfields Economic Development Initiative (BEDI) grants?**

No.

## Appendix A – CDBG Financial Summary (PR26)

	Office of Community Planning and Development U.S. Department of Housing and Urban Development Integrated Disbursement and Information System PR26 - CDBG Financial Summary Report Program Year 2016 MEDFORD , OR	DATE: 11-09-17 TIME: 17:47 PAGE: 1
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**PART I: SUMMARY OF CDBG RESOURCES**

01 UNEXPENDED CDBG FUNDS AT END OF PREVIOUS PROGRAM YEAR	429,906.63
02 ENTITLEMENT GRANT	633,060.00
03 SURPLUS URBAN RENEWAL	0.00
04 SECTION 108 GUARANTEED LOAN FUNDS	0.00
05 CURRENT YEAR PROGRAM INCOME	125,277.00
05a CURRENT YEAR SECTION 108 PROGRAM INCOME (FOR SI TYPE)	0.00
06 FUNDS RETURNED TO THE LINE-OF-CREDIT	0.00
06a FUNDS RETURNED TO THE LOCAL CDBG ACCOUNT	0.00
07 ADJUSTMENT TO COMPUTE TOTAL AVAILABLE	104,445.32
08 TOTAL AVAILABLE (SUM, LINES 01-07)	1,292,688.95

**PART II: SUMMARY OF CDBG EXPENDITURES**

09 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	196,416.52
10 ADJUSTMENT TO COMPUTE TOTAL AMOUNT SUBJECT TO LOW/MOD BENEFIT	168,917.76
11 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 09 + LINE 10)	365,334.28
12 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	67,698.94
13 DISBURSED IN IDIS FOR SECTION 108 REPAYMENTS	0.00
14 ADJUSTMENT TO COMPUTE TOTAL EXPENDITURES	20,720.38
15 TOTAL EXPENDITURES (SUM, LINES 11-14)	453,753.60
16 UNEXPENDED BALANCE (LINE 08 - LINE 15)	838,935.35

**PART III: LOWMOD BENEFIT THIS REPORTING PERIOD**

17 EXPENDED FOR LOW/MOD HOUSING IN SPECIAL AREAS	0.00
18 EXPENDED FOR LOW/MOD MULTI-UNIT HOUSING	0.00
19 DISBURSED FOR OTHER LOW/MOD ACTIVITIES	196,416.52
20 ADJUSTMENT TO COMPUTE TOTAL LOW/MOD CREDIT	164,128.36
21 TOTAL LOW/MOD CREDIT (SUM, LINES 17-20)	360,544.88
22 PERCENT LOW/MOD CREDIT (LINE 21/LINE 11)	98.69%

**LOW/MOD BENEFIT FOR MULTI-YEAR CERTIFICATIONS**

23 PROGRAM YEARS(PY) COVERED IN CERTIFICATION	PY: PY: PY:
24 CUMULATIVE NET EXPENDITURES SUBJECT TO LOW/MOD BENEFIT CALCULATION	0.00
25 CUMULATIVE EXPENDITURES BENEFITING LOW/MOD PERSONS	0.00
26 PERCENT BENEFIT TO LOW/MOD PERSONS (LINE 25/LINE 24)	0.00%

**PART IV: PUBLIC SERVICE (PS) CAP CALCULATIONS**

27 DISBURSED IN IDIS FOR PUBLIC SERVICES	93,149.74
28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	1,809.26
29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	0.00
30 ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS	0.00
31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30)	94,959.00
32 ENTITLEMENT GRANT	633,060.00
33 PRIOR YEAR PROGRAM INCOME	74,258.47
34 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP	0.00
35 TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34)	707,318.47
36 PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35)	13.43%

**PART V: PLANNING AND ADMINISTRATION (PA) CAP**

37 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	67,698.94
38 PA UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	0.00
39 PA UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	0.00
40 ADJUSTMENT TO COMPUTE TOTAL PA OBLIGATIONS	20,720.38
41 TOTAL PA OBLIGATIONS (LINE 37 + LINE 38 - LINE 39 +LINE 40)	88,419.32
42 ENTITLEMENT GRANT	633,060.00
43 CURRENT YEAR PROGRAM INCOME	125,277.00
44 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PA CAP	104,289.61
45 TOTAL SUBJECT TO PA CAP (SUM, LINES 42-44)	862,626.61
46 PERCENT FUNDS OBLIGATED FOR PA ACTIVITIES (LINE 41/LINE 45)	10.25%

**LINE 17 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 17**

Report returned no data.

**LINE 18 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 18**

Report returned no data.

**LINE 19 DETAIL: ACTIVITIES INCLUDED IN THE COMPUTATION OF LINE 19**

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2015	17	370	6032782	Neighborhood Infrastructure Improvements Project	03L	LMA	\$25,260.79
					<b>03L</b>	<b>Matrix Code</b>	<b>\$25,260.79</b>
2016	8	385	6032782	Foster Grandparent Program	05A	LMC	\$9,000.00
2016	9	384	6032782	Senior Advocacy Program	05A	LMC	\$8,959.00
					<b>05A</b>	<b>Matrix Code</b>	<b>\$17,959.00</b>
2016	6	387	6032782	Furthering Fair Housing Legal Program	05C	LMC	\$12,000.00
					<b>05C</b>	<b>Matrix Code</b>	<b>\$12,000.00</b>
2016	5	386	6032782	Wrap Around Case Management Program	05D	LMC	\$22,500.00
2016	7	391	6032782	Our Kids-Our Community	05D	LMC	\$17,500.00
					<b>05D</b>	<b>Matrix Code</b>	<b>\$40,000.00</b>
2016	4	383	6032782	Reducing Medford Homelessness in 2016	05Q	LMC	\$23,190.74
					<b>05Q</b>	<b>Matrix Code</b>	<b>\$23,190.74</b>
2016	1	388	6034702	Homeowner Repair Program	14A	LMH	\$78,005.99
					<b>14A</b>	<b>Matrix Code</b>	<b>\$78,005.99</b>
<b>Total</b>							<b>\$196,416.52</b>

**LINE 27 DETAIL: ACTIVITIES INCLUDED IN THE COMPUTATION OF LINE 27**

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2016	8	385	6032782	Foster Grandparent Program	05A	LMC	\$9,000.00
2016	9	384	6032782	Senior Advocacy Program	05A	LMC	\$8,959.00
					<b>05A</b>	<b>Matrix Code</b>	<b>\$17,959.00</b>
2016	6	387	6032782	Furthering Fair Housing Legal Program	05C	LMC	\$12,000.00
					<b>05C</b>	<b>Matrix Code</b>	<b>\$12,000.00</b>
2016	5	386	6032782	Wrap Around Case Management Program	05D	LMC	\$22,500.00
2016	7	391	6032782	Our Kids-Our Community	05D	LMC	\$17,500.00
					<b>05D</b>	<b>Matrix Code</b>	<b>\$40,000.00</b>
2016	4	383	6032782	Reducing Medford Homelessness in 2016	05Q	LMC	\$23,190.74
					<b>05Q</b>	<b>Matrix Code</b>	<b>\$23,190.74</b>
<b>Total</b>							<b>\$93,149.74</b>

**LINE 37 DETAIL: ACTIVITIES INCLUDED IN THE COMPUTATION OF LINE 37**

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2016	10	382	6032782	Program Administration	21A		\$67,698.94
					<b>21A</b>	<b>Matrix Code</b>	<b>\$67,698.94</b>
<b>Total</b>							<b>\$67,698.94</b>