



**2019/20 PROGRAM YEAR
CONSOLIDATED ANNUAL
PERFORMANCE EVALUATION REPORT**

FOR THE

CITY OF MEDFORD

**COMMUNITY DEVELOPMENT BLOCK
GRANT PROGRAM**

July 1, 2019 through June 30, 2020

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Contents

LIST OF TABLES	ii
CR-05 - Goals and Outcomes 91.520(a), 91.520(g)	1
CR-10 - Racial and Ethnic Composition of Families Assisted 91.520(a).....	12
CR-15 - Resources and Investments 91.520(a).....	13
CR-20 - Affordable Housing 91.520(b)	16
CR-25 - Homeless and Other Special Needs 91.220(d, e); 91.320(d, e); 91.520(c)	19
CR-30 - Public Housing 91.220(h); 91.320(j).....	23
CR-35 - Other Actions 91.220(j)-(k); 91.320(i)-(j)	24
CR-40 - Monitoring 91.220 and 91.230	32
Citizen Participation Plan 91.105(d); 91.115(d)	33
CR-45 - CDBG Misc. 91.520(c)	35
Appendix A – Financial Summary.....	36
Appendix B - Resolution 2020-161	38

LIST OF TABLES

Table 1 - Accomplishments – 2019/20 Program Year	5
Table 2 - Strategic Plan to Date (2015-19 Consolidated Plan)	7
Table 3 – Assistance to Racial and Ethnic Populations by Source of Funds	12
Table 4 – Resources Made Available	13
Table 5 – Geographic Distribution and Location of Investments.....	15
Table 6 – Households Provided Affordable Housing Units	16
Table 7 – Households Provided Affordable Housing Support.....	16
Table 8 – Extremely Low- and Low-Income Persons Served.....	18

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)
This could be an overview that includes major initiatives and highlights that were proposed and executed throughout the program year.

The 2019/20 program year (PY), referred to hereafter as the 2019 PY, marked the fifth and final year of the City of Medford 2015-19 Consolidated Plan. Throughout the year, the City focused primarily on strategies to reduce barriers to the development of affordable housing, improve housing stability for families at risk of becoming homeless, and increase sustainable community capacity to address homelessness. Building awareness and understanding; increasing collaboration, partnership, and political will; strengthening impact through strategic investment of existing City resources; and helping to secure additional resources are flagged as key initiatives during the 2019 PY. A summary of major initiatives and highlights proposed and executed throughout the program year include the following:

- Adopted the strategic Medford Homeless System Action Plan (HSAP) Implementation Plan of five goals and 32 actions to accomplish three primary objectives: 1) define the City's role in addressing homelessness and housing instability; 2) identify actionable goals for the City to implement and/or support based on identified system and service gaps; and 3) develop a driving document to assist Council with establishing priorities, partnerships and funding decisions over the next several biennia.
- Worked extensively with consultant ECONorthwest to develop the 2020-2024 Consolidated Plan, leveraging the Community Health Improvement Plan (CHIP), City's Homeless System Action Plan, City's Liberty Park Plan, and others, along with incorporating public feedback through a community-wide survey and community listening session.
- Approved the first annual funding recommendations of the Housing Advisory Commission (HAC) for the newly implemented Housing Opportunity Fund (HOF), derived from local construction excise tax revenue of 1/3 of 1 percent on building permit valuations and aligned with the 2020-2021 City Council Goals and the Statewide Housing Plan Goals from Oregon Housing & Community Services (OHCS), of \$400,000. Hearts With A Mission was awarded \$150,000 to support the completion of a new youth and emergency homeless shelter to serve ages 10-17, and ColumbiaCare was awarded \$250,000 to support construction of 16 new units for homeless veterans. The HOF was established to provide a flexible, dedicated funding source to support the development of affordable housing and to provide developers with leverage to capture additional resources from funders with aligning goals and objectives.
- Opened the COVID-19 temporary homeless campground on July 27, 2020 in partnership with Rogue Retreat, the Medford Police Department and several other community

partners, providing on-site management for 24 hours per day, along with case management, healthcare services and amenities of food, shower, laundry, garbage, and handwashing and portable restrooms. The campground had 25 sites and follows the Center for Disease Control guidelines, incorporating proper social distancing measures.

- Established and adopted a balanced funding platform, prioritizing housing and homelessness, through the City of Medford's 2019-21 Program Funding Priorities for housing and community development projects adopted in November 2019.
- Developed the Chronically Homeless Outreach Partnership (CHOP), a 24-agency collaboration, supported with leverage from the City and a grant from Providence of \$50,000. This partnership has leased the Summit House through OnTrack Rogue Valley to assist with providing transitional housing for five homeless individuals identified through the CHOP. The CHOP was founded by the City's Livability Team, a dedicated team of police personnel to the downtown area and Bear Creek Greenway, with a primary mission to conduct outreach and address livability concerns centralized around homelessness. The CHOP relies on Rogue Retreat's Kelly Shelter to provide homeless community members with stabilizing shelter before placement to transitional or permanent housing.

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)

Table 1 on pages 5-6 provide comparisons of expected versus actual outcomes accomplished during the 2019 PY. (Please see Table 1 for descriptions of objectives referenced in this section.) The City exceeded or achieved expectations in categories summarized below:

Affordable Housing - Objective 2

Public Facility or Infrastructure Activities for LMI Housing:

Housing Authority of Jackson County's (HAJC) Newbridge Place, a 63-unit affordable housing complex serving households under 50% Area Median Income, achieved expectations by serving 63 extremely low- and low-income households with affordable housing.

Tenant-Based Rental Assistance/Rapid Rehousing/Homelessness Prevention:

St. Vincent de Paul exceeded expectations, serving 84 actual versus 60 expected households via rental assistance (198 individuals versus 140 expected), helping households and individuals prevent homelessness.

Public Services - Objective 1

Public Service Activities Other Than LMI Housing Benefit:

Maslow Project and Rogue Retreat exceeded performance expectations during the program year. Maslow Project served 1,799 homeless and those at risk of experiencing homelessness youth and families versus anticipated 1,350. Rogue Retreat served 45 versus 30 individuals

experiencing homelessness with development of participants' employment-related skills through cleaning streets within the downtown Medford corridor.

Homeless Person Overnight Shelter

Through Hearts with a Mission's Shelter and Extended After Care program, 139 homeless youth were served versus anticipated performance of 120 with overnight shelter and services.

Categories that did not meet anticipated performance outcomes are summarized below:

Affordable Housing - Objective 1

Housing Authority of Jackson County's (HAJC's) Homeowner Repair Program for 2019 fell short of expected performance, as funds had not yet been completely expended during the PY. In addition, as with previous years, Medford continues to experience a shortage of construction labor, which notably contributes to overall increased construction costs.

Affordable Housing - Objective 2

Public Facility or Infrastructure Activities for LMI Housing

Two projects fell short of expected performance outcomes, as projects experienced construction delays coupled with the COVID-19 pandemic: Addictions Recovery Center and OnTrack, both serving those recovering from addiction through transitional housing rehabilitation. City staff has worked extensively with the project managers during the procurement process, and projects are marked for completion in the 2020/21 PY.

Homeowner & Rental Housing Rehabilitated

Rebuilding Together Rogue Valley's (RBTRV) project installing accessible ramps for persons with disabilities fell short of its goal due to environmental review delays in conjunction with delays caused by the COVID-19 pandemic. Staff is working closely to assist with project completion, expected for 2020/21 PY.

Tenant-Based Rental Assistance/Rapid Rehousing

Two rental assistance programs, awarded funding from the Community Development Block Grant (CDBG) CARES Act/COVID-19 (CV) federal funding to help prevent, prepare for, and respond to COVID-19, recently started through St. Vincent de Paul, serving those of low- to moderate-income households; and Community Works, serving those fleeing from domestic violence with anticipated completion by the end of 2020/21 PY.

Public Services - Objective 1

Public Service Activities Other Than LMI Housing Benefit

Youth 71Five's vocational training project fell short of anticipated performance, serving 17 homeless youth versus 35 anticipated due to challenges encountered from the COVID-19 pandemic.

Center for NonProfit Legal Services' CDBG-CV program recently started with expected completion date for the end of 2020/21 PY. Moreover, the City's Child Care Program through

CDBG-CV to expand child care capacity using eligible providers has also experienced temporary delays.

Community Development - Objective 1

Public Facility or Infrastructure Activities Other Than LMI Housing Benefit

The 2018 and 2019 Compass House projects reported less than expected performance. Compass House's property renovation project for 2018 serving persons with disabilities and mental illness misestimated the number served, 850 expected with 759 actual. Project's impact, however, will be long lasting and continue to serve those of disabilities.

The 2019 Compass House project experienced delays due to unforeseen construction expenses, coupled with COVID-19's impact, causing project's delay. This project is anticipated to begin in March 2021 and complete by June 2021.

Table 1 - Accomplishments – 2019/20 Program Year

Goal	Description	Indicator	Expected Outcome	Actual Outcome	Unit of Measure	Percent Complete
1	Affordable Housing - <i>Objective 1</i> Improve and maintain living conditions, safety and long-term affordability of rental and/or homeowner housing occupied by low/moderate-income and special needs households.	Homeowner Housing Rehabilitated <ul style="list-style-type: none"> - Housing Authority of Jackson County Homeowner Repair Program 2019 (14) - Housing Authority of Jackson County Homeowner Repair Program 2018 (2) 	18	16	Housing Units	88.89%
1	Affordable Housing - <i>Objective 2</i> Create more opportunities for low/moderate-income and special needs residents to secure affordable and livable rental and/or homeowner housing.	Public Facility or Infrastructure Activities for LMI Housing: <ul style="list-style-type: none"> - Addictions Recovery Center (0) - OnTrack (0) - Housing Authority of Jackson County - Newbridge (63) 	50	63	Housing Units	126%
		Homeowner & Rental Housing Rehabilitated: <ul style="list-style-type: none"> - Rebuilding Together Rogue Valley (6 units - 4 homeowner; 2 rental) 	20	6	Housing Units	30%
		Tenant-based rental assistance/Rapid Rehousing/Homelessness Prevention: <ul style="list-style-type: none"> - St. Vincent de Paul (84/198 - households/persons) <i>CDBG-CV:</i> <ul style="list-style-type: none"> - <i>CV - St. Vincent de Paul (0)</i> - <i>CV - Community Works (0)</i> 	157 total; CDBG: 60	84	Households	53.50%

2	Public Services - <i>Objective 1</i> Improve the opportunities of low/moderate-income and special needs residents to become self-sustaining through the availability and accessibility of essential support services offered directly through public service agencies.	Public service activities other than LMI Housing Benefit: <ul style="list-style-type: none"> - Maslow Project (1,799) - Rogue Retreat (45) - Youth 71Five Vocational Training (17) <u>CDBG-CV:</u> <ul style="list-style-type: none"> - CV - Center for NonProfit Legal Services (0) - CV - City of Medford - Child Care Program using Eligible Providers (0) 	1,528; CDBG: 1,415 CDBG-CV: 113	1,861	Persons	121.79%
		Homeless Person Overnight Shelter <ul style="list-style-type: none"> - Hearts with a Mission (139) 	120	139	Persons	115.83%
3	Community Development (Non-Housing) - <i>Objective 1</i> Improve community infrastructure and facilities, reduce blighting influences, and preserve and build community through neighborhood revitalization in low/moderate-income neighborhoods.	Public Facility or Infrastructure Activities other than LMI Housing Benefit <ul style="list-style-type: none"> - Compass House 2019 (0) - Compass House 2018 (759) - Youth 71Five Ministries (0) 	850	759	Persons	79.89%

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

Goal	Description	5-Year Funding	Indicator	Expected Outcome	Actual Outcome	Unit of Measure	Percent Complete
1	Affordable Housing - Objective 1	\$1,000,000	Homeowner Housing Rehabilitated	76	75	Housing Units	98.68%
			Rental Housing Rehabilitated	0	1	Housing Units	N/A *Not listed in ConPlan
1	Affordable Housing - Objective 2	\$35,000	Public Facility or Infrastructure Activities for LMI Housing	50	199	Households	398%
			Homeowner Housing Added	3	0	Housing Units	N/A *Not listed in ConPlan
			Tenant-based Rental Assistance/Rapid Rehousing	7	215	Households	3,071.43%
			Rental Housing Rehabilitated	0	2	Housing Units	N/A *Not listed in ConPlan
			Homeowner Housing Rehabilitated	0	4	Housing Units	
2	Public Services - Objective 1	\$434,025	Public service activities other than LMI Housing Benefit	7,166	9,856	Persons	137.54%
			Homeless Person Overnight Shelter	1,875	581	Persons	30.99%
			Homeless Prevention	0	1,012	Persons	N/A *Not listed in ConPlan
3	Community Development - Objective 1	\$2,056,280	Public Facility/ Infrastructure other than LMI Housing Benefit	6,030	9,890	Persons	164.01%
			Buildings Demolished	27	5	Buildings/ Structures	18.52%

	Code Violations Resolved	0	31	Properties	N/A *Not listed in ConPlan
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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 2019 PY are referenced below:

Goal 1) Improve the Condition and Availability of Affordable Housing.

Under the 2015-19 Consolidated Plan, the City allows for the use of several strategies to improve and maintain existing housing and to create more opportunities for LMI residents to secure affordable and livable housing. Strategies incorporated during the 2019 PY included no-interest loans for housing rehabilitation for homeowners and to support transitional housing for those recovering from addiction, provide financial assistance for rent payments and deposits, and increase accessibility through modular ramps for persons of disabilities.

Homeowner Housing Rehabilitated: The City, through its Homeowner Repair Program administered by HAJC, expended \$284,816.39 in 2019 and \$22,209.40 in 2018 entitlement funds to provide zero-interest, deferred loans to 16 LMI homeowners in need of rehabilitation to correct hazards and conditions affecting health and affordability. Four homes were improved to meet an Energy Star rating, 16 were brought from substandard to standard condition, nine homeowners were senior citizens, and one home was brought into compliance with lead safety rules. Activities included repairing roofs, failing heating and plumbing systems, unsafe wiring, weatherization and other minor emergency repairs. Given Medford's high percentage of aged housing stock, the City continues to prioritize this program to maintain decent and affordable housing for existing homeowners.

In addition, through Rebuilding Together Rogue Valley (RBTRV), four homeowners increased accessibility and safety for households of persons with disabilities through the implementation of modular ramps.

Rental Housing Rehabilitated: The City, through RBTRV, also rehabilitated two rental units to increase accessibility and safety for households of persons with disabilities through the implementation of modular ramps.

Public Facility/Infrastructure Activities for LMI Housing Benefit:

After recovery from delays, HAJC completed construction of Newbridge Place, a 64-unit affordable housing complex which expended \$323,504.40 in PY 2016 CDBG funds during the 2018 PY to construct streets and other improvements. Construction finished during the first quarter of the 2019 PY and the grand opening celebration was commemorated on October 24, 2019 with City staff in attendance. Upon full occupancy, 63 units were reserved for low- to moderate-income (LMI) individuals (earning no more than 50% AMI) with one unit reserved for the complex housing manager. Project also collaborated with the Maslow Project and DHS to

serve formerly homeless youth and families and the Veterans Affairs Southern Oregon Rehabilitation Center and Clinics (VA SORCC) to serve veterans.

Homeowner Housing Added: Habitat for Humanity (HfH) expended \$98,051 in CDBG funds for the acquisition of 1026 W 10th Street previously. Two households successfully purchased two of the three townhomes in July 2020, to be reported in the 2020 PY CAPER. With challenges that arose by the COVID-19 pandemic, the third household temporarily lost employment and was unable to close in July but fortunately, was able to recently successfully regain employment with estimated closing date in December 2020.

Tenant-Based Rental Assistance/Rapid Rehousing/Homelessness Prevention: St. Vincent de Paul helped prevent homelessness through assisting 84 households and 198 persons through rental deposit assistance.

Goal 2) Improve the Ability of Low/Moderate-Income and Special Needs Populations to Become Self-Sustaining.

As in past program years, City Council granted the full HUD allowable CDBG public service allocation for 2019 of \$107,329 to five nonprofits addressing priority needs including homeless and homeless prevention services; rental assistance; emergency shelter services; vocational training for homeless youth; and vocational training for homeless individuals. Public service activities were supported through Hearts with a Mission, Maslow Project, Rogue Retreat, and Youth 71Five Ministries. St. Vincent de Paul, while also considered a public service program, is located under Goal 1, due to providing direct affordable housing assistance. Collectively, these agencies served 2,198 individuals with public services aimed at increasing self-sufficiency.

Homeless Person Overnight Shelter: The City supported Hearts with a Mission, Medford's only permanent youth emergency homeless shelter, with \$25,000 to support operations that served 139 unduplicated homeless youth. Additional local resources, through the Housing Opportunity Fund, awarded \$150,000 to Heart's With a Mission for the completion of a new 15-bed homeless youth shelter, which allowed the existing youth shelter to serve transitional youth (aging out of the youth program).

Public Service Activities other than LMI Housing Benefit: The City supported three public service agencies: the Maslow Project, Rogue Retreat, and Youth 71Five Ministries with \$52,329, benefitting 1,799 homeless youth and families, 45 homeless individuals with vocational training through cleaning the downtown Medford corridor, and 17 homeless youth with learning vocational trades.

Goal 3) Improve Living Conditions by Addressing Community Development Projects that Improve Public Infrastructure, Public Facilities, and Neighborhood Revitalization.

Annual strategies incorporated during the year that resulted in accomplishments under Goal 3 included: providing assistance to renovate and install improvements to public facilities and improving opportunities for those with mental illness.

Public Facility or Infrastructure Activities other than LMI Housing Benefit: The City expended \$128,511.50 from the 2018 program year in 2019 to support Compass House, which completed renovation of their new facility serving 759 persons with disabilities and mental illness with sustained, continued impact for years to come.

Youth 71 Five Ministries renovated with just under \$25,000 in CDBG funding from 2014, 2015 and 2017 to support a new youth community center with expenditures and performance to be reported in PY 2020. With assistance from City staff and the City's HUD representative, funds were used to purchase eligible appliances and a custom shed. Prior delays experienced were due to extensive, unanticipated environmental and conditional use permitting delays. Completion of construction is anticipated to be completed by December 31, 2020 with performance to be reported in PY 2020.

Enforce City Codes: As a result of priorities associated with COVID-19, protests, and the fire disaster, \$3,139.66 in remaining CDBG funds were returned by the Medford Police Department.

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

	CDBG
White	2,335
Black or African American	78
Asian	21
American Indian or American Native	68
Native Hawaiian or Other Pacific Islander	34
Total	2,536
Hispanic/Latino	548
Not Hispanic/Latino	1988

Narrative

The City invested in nonprofit agencies providing assistance to LMI and special needs beneficiaries of varying race and ethnicity. Table 3 above reflects the total number served as reported in HUD's IDIS. A total of 2,536 people were served under the categories listed in Table 3. Among all single race beneficiaries, 21.61% were Hispanic/Latino; and 1,988 or 78.39%, not Hispanic/Latino.

Additional races not listed in the IDIS-generated table included two American Indian or Alaskan Native and White; five Black or African American and White; one American Indian/Alaskan Native and Black/African American; and 384 Other Multi-Racial. Among the combined persons/families not reported, 39 identified as Hispanic/Latino.

CR-15 - Resources and Investments 91.520(a)

Identify the resources made available

Table 4 – Resources Made Available

Resources Made Available	Amount Expended During Program Year	Remaining Resources
CDBG: \$1,160,663.61	CDBG: \$704,002.41	CDBG: \$456,661.20
<u>CDBG-CV: 432,691.00</u>	<u>CDBG-CV: 0.00</u>	<u>CDBG-CV: 432,691.00</u>
\$1,593,354.61	\$704,002.41	\$889,352.20

Narrative

Resources made available and amounts expended during the 2019 PY were calculated through the IDIS reporting system. Amounts were verified during a review of 2017 through 2019 program year vouchers reported under IDIS PR-07.

The above referenced figures have been used to make appropriate adjustments to PR-26 illustrated in Appendix A. (The PR-26 may vary slightly due to rounding in certain instances.)

Line 10: \$235,835.75 was entered as an adjustment to reflect low/mod expenditures that were draw during the 2020 program year under Vouchers 6417615 and 6434163, input 9/29/2020 and 11/23/2020. Program Administration and Planning activities were not included in this adjustment. See the summary below:

Voucher/Activity Name	IDIS Activity	Expenditure
Voucher 6434163		
St. Vincent de Paul Housing Move-in	434	\$ 30,000.00
Maslow Project Safety Net Services	429	\$ 12,957.85
Hearts With A Mission Shelter Care	424	\$ 10,000.00
Youth 71Five Vocational Training PSP	430	\$ 9,632.91
Homeowner Repair 2019 PY	428	\$ 16,676.91
Youth 71Five Youth Center CIP	411	\$ 15,854.89
Voucher 6417615		
Youth 71Five Youth Center CIP	411	\$ 8,574.89
St. Vincent de Paul Housing Move-in	434	\$ 1,570.91
Homeowner Repair 2019 PY	428	\$ 130,567.39
		\$ 235,835.75

Line 14: \$56,003.94 was entered as an adjustment to account for expenditures not reported in the 2019 PY. Voucher 6434163 was drawn on 11/23/2020, and included the following expenditures that were not included in lines 11 through 13: 1) Program Administration, IDIS #427, \$41,034 and 2) Consolidated Plan, IDIS #435, \$14,969.94.

Line 20: \$235,835.75 was also entered as an adjustment to line 19, as all activities referenced above under Line 10 are LMC, LMA or LMJ, and included as directed by IDIS.

Line 30: \$64,161.67 was entered to adjust total public service obligations and cap, reflecting 2019 expenditures drawn more than 90 days after the close of the program year for activities 434 (\$31,570.91); 430 (\$9,632.91); 429 (\$12,957.85); and 424 (\$10,000).

Line 40: \$56,004.06 was entered as an adjustment to total accrued expenditures for program administration and planning activities not included in line 37 or line 38. IDIS Activity No. 427, Program Administration (\$41,034.43, Matrix Code 21A) and IDIS No. 435 Consolidated Plan (\$14,969.63, Matrix Code 20).

Identify the geographic distribution and location of investments

The City of Medford did not utilize target areas for distribution of CDBG funds under the 2019/20 Action Plan. The chart below illustrates actual percentages of the allocation of expended CDBG funds, excluding program administration, during the 2019 PY.

Table 5 – Geographic Distribution and Location of Investments

Target Area	Planned Percentage of Allocation	Actual Percentage of Allocation	Narrative Description
Eligible Block Groups	N/A	0%	Eligible Census Tract/Block Benefit
Citywide	N/A	100%	LMI Individual Benefit

Narrative

The City expended 100% of available CDBG funding for LMI individual benefit.

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 subrecipients. Annual 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 funding sources during the 2019 PY included foundations, other federal funds, other state/local funds, private contributions, and program fees or dues. Excluding program administration funds, projects and programs expending CDBG dollars during the year, whether the project was completed during the year or not, expended \$581,944.50. These projects provided a combined expended leverage of \$20,893,451. Of the combined leverage, leverage for the HAJC's Newbridge Place, an affordable housing complex, composed of \$17,304,442. Among the leverage sources, private contributions accounted for 75.67% of the total leverage (primarily from Newbridge Place with \$14,829,673); other state or local, 16.64%; foundations, 5.21%, and other federal, 2.48%.

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

	One-Year Goal	Actual
Number of Homeless households to be provided affordable housing units	30	29
Number of Non-Homeless households to be provided affordable housing units	48	78
Number of Special-Needs households to be provided affordable housing units	70	62
Total	148	169

Table 7 – Households Provided Affordable Housing Support

	One-Year Goal	Actual
Number of households supported through rental assistance	60	84
Number of households supported through the production of new units	0	63
Number of households supported through rehab of existing units	88	22
Number of households supported through acquisition of existing units	0	0
Total	148	169

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

Number of homeless households to be provided affordable housing units: The 2019/2020 PY included activities that served homeless individuals to be provided affordable housing opportunities, specifically St. Vincent de Paul through providing rental assistance. St. Vincent de Paul estimated that 50% of households served through rental assistance would be homeless households, but this figure was misestimated. Given heightened regional awareness and increasingly available financial resources, the City anticipates an increase in requests and outcomes related to serving homeless individuals will occur in subsequent program years.

Number of non-homeless households to be provided affordable housing units: The HAJC served 14 households (vs. 18) through the 2019 Homeowner Repair Program (HRP); it is anticipated that COVID-19 caused delays. Following the completion of the program year, HAJC spent the remaining PY 2019 funds in October 2020. For carryover funds from 2018 for HAJC, 2 households

were served within PY 2019. Actuals exceeded projections in this category due to the completion of 64-unit Newbridge Place, a PY 2016 project, with 63 units reserved for affordable housing and the last unit reserved for an on-site property manager.

HfH acquired the existing unit at 1026 W 10th Street in July 2019 and went through the substantial amendment process to convert the property into three new homebuyer units in May 2019. Project is near to completion as two homebuyers closed in July 2020 with the third homebuyer expected to close in December 2020, to be reported in the 2020/2021 CAPER.

Number of special-needs households to be provided affordable housing units: The transitional housing rehabilitations for the Addictions Recovery Center (ARC) and OnTrack (serving individuals recovering from addiction) experienced delays due to environmental and construction delays of two projects with updated completion date anticipated for June 2021. In addition, Rebuilding Together Rogue Valley (RBTRV) completed 6 of the 20 ramps to increase accessibility for individuals with disabilities, also due to experiencing environmental and construction delays, coupled with challenges encountered from COVID-19.

HAJC's Newbridge project (from FY 2016) helped 30 households with disabilities also obtain affordable rental housing.

Number of houses supported through rental assistance: As illustrated in Table 7, rental assistance performance exceeded expectations. The variance of 24 households is attributed to an under-estimation at the time of CDBG application and agreement.

Number of households supported through rehab of existing units: Due to delays experienced because of COVID-19, environmental reviews, overall project delays, and City staff capacity, the ARC, HAJC, OnTrack, and RBTRV fell short of their goals.

Discuss how these outcomes will impact future annual action plans.

Working through barriers to development associated with the environmental review and procurement processes and increasing staffing capacity is expected to positively impact future annual action plans. Due to continued challenges in staff capacity, combined with difficult circumstances as a result of the COVID-19 epidemic, the division has acquired assistance from a Planner, interested in learning about the environmental review process, to perform future environmental reviews, as needed. Better systems and delegation are in place for more efficient performance estimation and project management.

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 Households Served

Number of Persons Served	CDBG Actual	HOME Actual
Extremely Low-income	86	n/a
Low-income	57	n/a
Moderate-income	26	n/a
Total	169	n/a

Narrative Information

Agencies contributing to the numbers above include HAJC’s Homeowner Repair program for 2018 and 2019, St. Vincent de Paul, Rebuilding Together Rogue Valley, and HAJC’s Newbridge Place As per IDIS, Table 8 demographics apply to households living in each household reported under Tables 6 and 7 that received housing assistance at each income level during the program year.

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.

The City awarded \$107,329, or 100%, of the allowable CDBG public service allocation to five agencies with an objective of reaching out to homeless persons. Supporting St. Vincent de Paul, Maslow Project, Hearts with A Mission, Rogue Retreat, and Youth 71Five Ministries helped the City achieve performance outcomes, collectively serving 2,198 individuals.

Outside of CDBG funding, the City allocated \$129,500 in valuable leverage funds from the City's local General Fund Grant (GFG) program to support homeless persons and services. Performance will be collected in January 2021.

As of the 2019/20 program year, the Community Development Grants Commission administers the General Fund Grant (GFG) program in alignment with CDBG funds to strategically invest City resources to meet the community's priority needs. Per City Council Bill 2019-122, City Council adopted biennial program funding priorities on November 21, 2019, establishing a funding platform to further assist with the effective prioritization and allocation of City resources. This resolution included the prioritization of GFG program funds of \$300,100, with 50 percent designated to essential safety net services and 50 percent to housing stabilization and rapid re-housing programs. These two housing programs provide temporary financial assistance to homeless households or low-income households at risk of losing their housing. Using this platform, staff combined the funding cycles and application processes for both the CDBG & GFG programs, in order to increase efficiency with limited staff capacity. In addition, the City established a performance measure for 85% of program participants to sustain housing after six months for all City-funded homeless programs, aligning with the Statewide Housing Plan Goals from Oregon Housing & Community Services (OHCS).

In addition, the City continued to capitalize on a \$23,375 2018 PY investment in the completion of the Medford Homeless System Action Plan (HSAP), which identifies five goals and 32 actions to be accomplished or initiated by June 30, 2021. The five goals include: 1) Support the development 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; and 5) Increase diversion and prevention strategies.

In September 2019, the City of Medford Police Department's Livability Team (LVT) created a 24-agency partnership focused on outreach to chronically homeless community members living along the Bear Creek Greenway and in the downtown area. This effort has significantly improved

the City's ability to address unsheltered homelessness and encampments, or Goal 3 of the HSAP. Members from the LVT partner with non-uniformed professionals from agencies including, but not limited to, Jackson County Mental Health, ACCESS, Rogue Retreat, La Clinica, Maslow Project, Addictions Recovery Center, Veteran's Administration, Options, Mercy Flights, and the Medford Gospel Mission. Together, members from this partnership, known as the Chronically Homeless Outreach Partnership (CHOP), have been successful at building impactful relationships with the community's unhoused residents, on a person-by-person basis.

During the 2019 PY, the City financially supported the CHOP with a \$90,000 allocation from the HSAP fund. Rogue Retreat received the full \$90,000 to provide case management services through the Kelly Shelter, which is the community's only year-round permanent shelter providing emergency shelter to unhoused residents receiving outreach services through the CHOP. The City optimistically anticipates the CHOP will continue to grow both through membership and financial support for years to come.

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

As presented in previous sections, the City supported Hearts with a Mission, Medford's only permanent youth emergency homeless shelter, with \$25,000 to support operations that served 139 unduplicated youth. Of those served, 99% were re-unified with family or a safe alternative, and 100% progressed towards personalized goals in a variety of areas including: physical and medical, behavioral and life skills, mental health, education and employment, and safe exit, when necessary.

In addition, the premier Housing Opportunity Fund (HOF) funding recommendations, a local funding source derived from a construction excise tax of 1/3 of 1% on residential, commercial and industrial building permit valuations, addressed transitional housing needs by funding Hearts With A Mission with \$150,000 to support the completion of a new youth and emergency homeless shelter to serve ages 10-17 and ColumbiaCare with \$250,000 to support construction of 16 new units for homeless veterans. The grand opening of the new homeless youth shelter occurred on December 5, 2019. ColumbiaCare's project is anticipated for completion in March 2021. The HOF was established to provide a flexible, dedicated funding source to support the development of affordable housing and to provide developers with leverage to capture additional resources from funders with aligning goals and objectives.

Furthermore, the local funding source, the General Fund Grant (GFG), awarded \$73,850 to Community Works' Dunn House program, supporting emergency shelter for victims of domestic violence; Community Work's Transitional Living program, providing victims of domestic violence with transitional housing; and Hearts With A Mission's Shelter and Safety Net Services program, providing homeless youth with emergency shelter and services.

As a result of prior City support, the first low-barrier, year-round shelter in Jackson County, the Kelly Shelter operated by Rogue Retreat, opened on November 21, 2019. The City contributed \$90,000 from Homeless System Action Plan funding to support case management offered

through the Kelly Shelter, directly assisting the City-supported efforts of the Chronically Homeless Outreach Partnership (CHOP).

On March 19, 2020, Rogue Retreat, in partnership with the City of Medford Livability Team (LVT), the Planning Department, and OnTrack, opened the Summit House. The house is currently financially supported with a \$50,000 grant from Providence Health & Services awarded to the City to cover additional case management services and a lease agreement between Rogue Retreat and OnTrack. The Summit House provides five bedrooms for men who are prepared to move from the Kelly Shelter to a more independent living situation. Residents of the Summit House are part of Rogue Retreat's five-level case management program leading to self-sufficiency. During the 2019 PY, \$16,667 of the \$50,000 grant was expended, serving seven men with transitional housing.

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.

Five public service agencies collectively expended \$108,899.91 (including program income) in CDBG funds, serving 2,198 individuals, targeting LMI individuals and families that were homeless or at risk of experiencing homelessness. Services provided by St. Vincent de Paul, Maslow Project, Hearts With A Mission, Rogue Retreat, and Youth 71Five Ministries were summarized in the previous sections.

In addition, the Housing Authority of Jackson County's affordable housing complex (Newbridge Place) successfully achieved full occupancy, serving 63 low-income households with affordable housing. Additionally, Compass House's property renovation for PY 2018 completed in PY 2019, serving individuals with disabilities and mental illness.

The annual community meeting, a requirement of Oregon House Bill (HB) 4006 and hosted by the City's HAC, discussed rent burden causes and potential solutions on December 18, 2020. A variety of guest speakers included Medford Planning Director Matt Brinkley, Executive Director of the HAJC Jason Elzy, Representative Kim Wallan, Public Affairs Director Matt Stranahan from CPM Real Estate Services, and Southern Oregon Regional Organizer from the Community Alliance of Tenants Jesse Sharpe and gathered additional input through small group discussions.

Lastly, the General Fund Grant (GFG) program awarded \$300,100 to support services for low-income households and individuals, including assistance through food/nutrition, therapy and services for child abuse victims, transportation to non-emergency medical appointments for those of need, emergency shelter and transitional housing for victims of domestic violence, emergency shelter for homeless youth, services for sexual assault victims, permanent supportive housing for those with disabilities, and homelessness prevention through rental assistance.

Furthermore, the City anticipates that its merged funding platform, with staff coordinating CDBG and GFG funding and establishment of funding priorities as discussed previously above, will drive enhanced performance and leveraged opportunities for low-income individuals and families for years to come.

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.

Three of the five public service agencies receiving 2019 CDBG funding served homeless persons with direct assistance to help transition to permanent housing. Maslow Project assisted many individuals with securing permanent housing (using CDBG funding and other resources), St. Vincent de Paul transitioned 74 persons out of homelessness into permanent rental housing, and Hearts with a Mission reunified 137 youth with families or other safe alternatives. Moreover, Youth 71Five also assisted 17 homeless persons through vocational training, helping to prevent individuals from future occurrences of homelessness.

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

Actions taken to address the needs of public housing.

Housing Authority of Jackson County (HAJC) is the region's Public Housing Agency (PHA). Actions taken by HAJC during the 2015-19 Consolidated Plan period will collectively result in 114 new units of affordable housing in Medford. Construction of The Concord provided the downtown area with 50 new units in the 2016/17 PY. HAJC's new project, Newbridge Place, provided 64 new units at completion in the 2019 PY. Both complexes are subsidized through HUD's Housing Choice Voucher Program.

All original aged units owned by the HAJC, subsidized under HUD's old Public Housing Program, went through a disposition process with HUD in 2007. The proceeds were used to leverage construction of hundreds of new units such as The Concord and Newbridge Place. HUD no longer offers Public Housing Program funds to construct new public housing.

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

Although there are no public housing projects or units of public housing in Medford, the City prioritizes homeownership in multiple ways. This year, the City declared National Homeownership Month for June 2020, helping increase awareness of the City's prioritization of homeownership within the community, along with proclaiming Fair Housing Month for April 2020.

A study session in September 2019 between the Medford Housing Advisory Commission (HAC) and the Medford Urban Renewal Agency (MURA) Board explored a potential collaboration regarding the development of policies for prospective disposition of MURA-owned surplus properties in downtown Medford, in order to help meet community housing needs, effectively braid and leverage cash and non-cash assets and resources, and potentially increase diversity of housing types.

In addition, the City's Housing Opportunity Fund contributed 15% of the revenue from construction excise tax to Oregon Housing and Community Services (OHCS) for homeownership assistance passed through ACCESS. In 2019, the City's contribution of \$33,285.63 will help ACCESS increase the number of households provided with homeownership assistance.

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)

Medford has become a more collaborative, solutions-based community. With Council support and responsiveness to community input, the City's HAC vehemently led to direct and effect policy changes. The following are examples of City actions/ordinances taken during the 2019 PY to address barriers to affordable housing:

- DCA-18-144 (Ordinance No. 2019-76) – Cottage Cluster Development: The City allowed for Cottage Cluster Developments in four of the City's Residential Zoning including SFR-4 (corner lots only), SFR-6, SFR-10, and MFR-15 with up to 2x the maximum density of the underlying zone allowed.
- DCA-19-022 (Ordinance No. 2019-77) - Revised Minor Historic Review Process: The City amended the minor historic review process to promote necessary upgrades to housing in the historic district while increasing overall efficiency, including the expansion of over-the-counter permits for minor changes (i.e., paint color) with minimal processing and reduction of time needed to review, residential fencing if not visible from the right-of-way, new signage for downtown, and allowance for changing existing windows or doors for non-contributing, non-historic properties.
- DCA 19-001 (Ordinance No. 2019-91) - Allowance for Duplexes in Low-Density Zones: The City amended the code to allow for duplexes in low-density zones (previously not allowed).
- DCA-19-002 (Ordinance 2020-23) – Multi-Family Type II Review: The City allowed multi-family housing to be reviewed administratively (Type II) versus through public hearing (previously adding time to the development process) due to clear and prescriptive multi-family housing design standards for development in terms of 3 or more attached units, special use regulations for various forms of development, and zoning overlays.
- The HAC recommended for Medford City Council to approve the Permit-Ready ADU Program, dedicating no more than \$150,000 over an 18-month period to the preparation of permit-ready building plans and the offset of approximately 50% of city-imposed System Development Charges. The program shall implement short-term rental use deed restrictions as described by staff. Recommendation will go to City Council in PY 2020.
- Completed the Downtown Housing and Residential Market Analysis Study by Johnson Economics with the purpose to: 1) support residential development in downtown, 2)

better understand residential market dynamics throughout the City, and 3) provide the City decision makers with analytical tools, including the ability to test out different housing development scenarios for contractors through the Housing Opportunity Fund (HOF) to help reduce overall costs. Plan also seeks to address the Downtown City Center 2050 Plan, which seeks to have 4,000 residents living downtown by 2050.

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

During the 2019 PY, the Community Development Grants Commission (CDGC) served as the advisory body to Council on addressing the obstacles to meeting underserved needs through administration of the CDBG and General Fund Grant (GFG) programs; and working with the Housing Advisory Commission (HAC) to implement the Consolidated Plan, Annual Action Plan and Analysis of Impediments to Fair Housing Choice.

In order to maintain outreach to the priority needs of the underserved, the CDGC is comprised of community members including one current member of the Budget Committee, one member representing healthcare, one member representing social services, one member representing local business, one member representing workforce development, one member representing an educational institution, one member representing affordable housing and two members-at-large encouraging representation from throughout the whole community. This holistic approach was designed to have representation from multiple areas that directly interact with meeting underserved needs.

The CDGC also works directly with the HAC to help prioritize the affordable housing needs of underserved residents of Medford. The HAC is rostered with experts in the field of lending, affordable housing development, multi-family housing operation, construction and development, real estate services tenant organization. The HAC will further review housing policy, economic incentives and potential partnerships to cultivate affordable housing development for all residents including those that are underserved and homelessness.

The CDGC assists with administering the GFG along with CDBG. In November 2019, City Council approved a resolution to prioritize GFG program funds of \$300,100, with 50 percent designated to essential safety net services and 50 percent to housing stabilization and rapid re-housing programs, providing temporary financial assistance to homeless households or low-income households at risk of losing their housing. Using this platform, staff also combined the funding cycles and application processes for both the CDBG & GFG programs, in order to increase efficiency with limited staff capacity.

As mentioned previously, completion of the Homeless System Action Plan has also helped ensure prioritization of the needs of persons who are homeless or at risk of becoming homeless through the funding priorities established by Council in years to come.

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

The City's 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 over 466 homes. Among the 16 homes rehabilitated using 2018 & 2019 CDBG funding within the 2019 PY, 13 were built prior to 1978. HAJC reported that all 16 homes were raised from substandard to standard condition.

In addition, Mayor Wheeler proclaimed the week of October 20 – 26, 2019 as Lead-Based Paint Awareness Week, helping to bring community awareness to the hazards of lead-based paint.

During the 2019 PY, the City also continued efforts to develop a community collaborative to apply for HUD's Lead-Based Paint and Lead Hazard Reduction Grant during the 2019 PY. This action was officially approved by Council as part of the 2019 Action Plan on June 6, 2019. The City has engaged several organizations interested in implementing a Lead-Based Paint Hazard Removal Program to improve the health and safety of residents living in potentially hazardous conditions. Although exact roles and levels of commitment will be defined in the 2019 PY, the City has successfully engaged interested partners including Jackson County Health and Human Services, Oregon Health Authority, La Clinica, Housing Authority of Jackson County, OnTrack, AllCare Health, Jackson Care Connect, Medford Urban Renewal Agency, Belfor Environmental, S&B James Construction, and Youth 71 Five Ministries. Collaborative meetings, beginning in October 2019, were put on hold due to the COVID pandemic and devastating fires. However, City staff will continue to work on developing a plan to submit a collaborative application to the hazard removal grant program in in the 2020 or 2021 program year.

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 2019 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 2019/20 PY worked to reduce the immediate and/or future poverty-level of those served. Families received assistance with homelessness prevention through emergency rental housing assistance, family reunification, safety net services, referral services, comprehensive case-management, mentorship, transition out of homelessness, and vocational training. Expending \$108,899.91 in combined 2019 PY public service funding aided 2,198 persons to help manage or overcome poverty.

In addition, the City continues to support public service agencies through the GFG. Nine agencies supported perform essential safety net services: ACCESS, CASA (Court Appointed Special Advocates) of Jackson County, Community Volunteer Network, Community Works, Hearts With A Mission, Children's Advocacy Center, Jackson County Sexual Assault Response Team (SART), Maslow Project, and Rogue Valley Council of Governments' (RVCOG) Food and Friends. In addition, four agencies supported assist with housing stabilization programs: Community Works' Transitional Living Program, Maslow Project's Homeless to Housed Program, RVCOG's Home At Last Program, St. Vincent de Paul's Housing Move-in Program, and St. Vincent de Paul's Reducing Homelessness Program.

Affordability of Owner-Occupied Units: The City's 2018 & 2019 Homeowner Repair Program served 16 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. Six of these homeowners were seniors on limited and/or declining incomes.

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

Medford residents are fortunate to live in a community that over the past several years has begun to see the outcomes of increased political will and community collaboration. Examples of City actions to develop and strengthen institutional structure during the 2019 PY include but are not limited to the following:

- 1) Continued City staff participation on the Continuum of Care (CoC) Board and other CoC workgroups at a level that allows Council to stay connected with the priority needs and efforts of the CoC in addressing homelessness;
- 2) The City continued to work to achieve the following Council goals, established for the 2019-21 Biennium:
 - a) Helped achieve Council's goal to support the production of 100 housing units affordable to households earning $\leq 80\%$ and $\leq 120\%$ AMI by awarding \$250,000 from the Housing Opportunity Fund (HOF) to ColumbiaCare for the construction of 16 units for homeless Veterans
 - b) Contributed to Council's goal to increase the supply of supportive housing through the above described action, as the ColumbiaCare project will provide ongoing support to Veterans
 - c) Addressed unsheltered homelessness and encampments by funding the Medford Livability Team with City General Fund dollars, which resulted in the creation of the Chronically Homeless Outreach Partnership, a 24-agency working to help chronically homeless one person at a time with individualized and coordinated plans
 - d) Increased temporary housing programs that lead to permanent housing placements by awarding Hearts With A Mission (HWAM) with \$150,000 from the HOF to finish

construction of a 12-bed transitional housing complex for young adults aging out of the foster care system and those youth residing at HWAM's existing shelter

- e) Increased collaboration with nonprofits, faith-based organizations, businesses and other government agencies through the CHOP, which also helped the City secure a \$50,000 grant from Providence to fund a 5-bed co-housing option available to residents of the Kelly emergency shelter
- f) Adopted the implementation of the Homeless System Action Plan, consisting of 5 goals and 32 actions to address homelessness in coordination with the CoC and other partners
- g) Expanded homeless diversion and prevention strategies by awarding \$150,000 in General Fund Grant dollars to rental support and move-in programs and awarding \$50,000 from the HSAP Fund to a reunification program to help homeless individuals return to safe and viable support systems outside of Medford

3) Continued to work with Council-appointed advisory bodies, including the Community Development Grants Commission and Housing Advisory Commission, to impact housing development and address homelessness;

4) Maintained an institutional arrangement with Camas Consulting to improve services as a Responsible Entity under the National Environmental Policy Act to complete environmental assessments for the development of affordable housing projects involving both CDBG and non-CDBG funds, which resulted in the acquisition of an 82-unit affordable apartment complex with non-CDBG funds;

5) Continued to provide nonprofits, private businesses, faith-based organizations and other jurisdictions with technical assistance that can help cultivate collaborative community leveraging, partnership-ready initiatives, shovel-ready projects, and the implementation of economic incentives and policy change for the development of housing;

6) Maintained participation in a community collaboration launched by Jefferson Regional Health Alliance to complete the 2019-22 Community Health Improvement Plan (CHIP) for Jackson and Josephine Counties. This community-wide initiative involves the engagement and expertise of organizations and individuals from multiple sectors across our two-county region. The CHIP identifies six major themes including substance abuse, education and workforce growth, mental health and well-being, poverty and employment, parenting and life skills, and affordable housing; and

7) The City's Grant Support Technician continued to develop expertise in the administration of the CDBG program, which has drastically improved the capacity of the Housing and Community Development Division to effectively manage two commissions, administer six funding sources, seek additional grant funding, and implement 32 homeless actions and five goals during the 2019-21 Biennium.

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

The City maintained actions throughout the year to enhance coordination between public and private housing and social service agencies through active participation on the CoC Board and other CoC housing and services workgroups; collaborative actions taken during the completion of the Homeless System Action Plan (HSAP); and participation by several City staff from Planning, Police and Legal on the Chronically Homeless Outreach Partnership.

The City also took additional actions to coordinate with Housing Authority of Jackson County, ACCESS, and Camas Consulting to complete an environmental assessment, under the National Environmental Policy Act (NEPA) as the Responsible Entity of a non-CDBG funded project. This action helped remove environmental review-related barriers to the acquisition of an 82-unit multi-family apartment complex using public housing disposition funds. Within the first year of ownership, approximately \$2.5 million of private lending will be utilized to complete necessary rehabilitation activities. Following completion of acquisition, project-based vouchers will be issued to qualified candidates in the Medford community.

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

This year, the City consulted with Root Policy Research to update the 2020-2024 Analysis of Impediments, identifying two main challenges with development of seven proposed actions to improve knowledge and awareness of fair housing laws and the City's requirement to Affirmatively Further Fair Housing (AFFH).

Previously, City staff developed a Fair Housing Matrix to appropriately track the progress of overcoming all impediments identified in the City's 2015 Analysis of Impediments. Progress made to address impediments include:

- 1) *Housing affordability.* The City approved its first annual funding recommendations under the new Housing Opportunity Fund (HOF), a dedicated funding source to affordable housing, awarding Hearts With A Mission \$150,000 to support completion of a new youth emergency homeless shelter and ColumbiaCare with \$250,000 to support the construction of 16 new units for homeless veterans. The HOF will provide housing developers and providers with a flexible, dedicated funding source to incentivize development of new housing units for residents earning $\leq 80\%$ AMI and $\leq 120\%$ AMI.

As referenced previously, the City coordinated with Camas Consulting to complete an environmental assessment for a non-CDBG funded project, which allowed the Housing Authority of Jackson County to purchase an 82-unit apartment complex with public housing disposition funds. This project will incorporate project-based vouchers and add much needed affordable housing opportunities for Medford residents.

- 2) *Increased public awareness of fair housing rights:* The City of Medford collaborated with the City of Ashland to sponsor the Fair Housing Council of Oregon's Fair Housing for Shelter Staff and Volunteers training on October 4, 2019. Sixteen attendees represented nine organizations in Oregon, including: City of Medford, Community Works, Hearts With A Mission, Jackson County Homeless Task Force, Maslow Project, Options for Helping Residents of Ashland (OHRA), Rogue Retreat, Southern Oregon University, and State of Oregon's Oregon Housing Opportunities in Partnership (OHOP).

In addition, as approved by City Council in May 2020, the City will expend \$5,000 from CDBG program administration funding to facilitate five virtual training webinars through contracting with the Fair Housing Council of Oregon (FHCO) to help increase education and awareness of Fair Housing rights, promote fair housing choice, and foster an inclusive community. These five virtual training webinars will be tailored to the following target audience groups: Medford Planning Commission joined by the Housing Advisory Commission; Medford Community Services and Development Commission joined by the Multi-Cultural Commission; Southern Oregon Rental Owners Association; Nonprofit housing providers; and Homeless shelter providers.

Lastly, Medford Mayor Wheeler read a proclamation naming April as Fair Housing Month to help build support and education around fair housing rights.

- 3) *Increased efficiency of public transportation and mobility:* The City Engineering Department began a study on audible pedestrian signals (APS) at the intersections of Springbrook and Roberts Roads and Murphy and Barnett Roads. The study was initiated in response to a pedestrian in need of accessible improvements to address difficulty in picking up traffic cues, due in part to volumes and movements, lane configuration, and the leading pedestrian interval. This resident relies on this path to get to work. As a result of this effort, the City will consider using CDBG funds in 2021 to install audible push buttons at this location and potentially other areas within the City that are eligible and in need.
- 4) *Impacts of the subprime mortgage lending crisis and increased foreclosures:* The City relied on the Homeownership Center within the Community Action Agency, ACCESS, to help educate prospective homeowners towards long-term successful homeownership through homeownership education and counseling. For struggling homeowners within the region, the Homeownership Center participates in the OHCS Oregon Homeowner Stabilization Initiative (OHSI), which helps homeowners remain in their homes, using funding secured from Hardest Hit Funds (HHF) from the U.S. Department of Treasury.
- 5) *Predatory lending and other industry practices:* The City also relies on ACCESS to help educate potential homebuyers on predatory lending through homeownership counseling and homebuyer education courses, educating prospective homebuyers to help protect against predatory lending practices.

- 6) *Barriers to fair housing impacts on special need populations:* City staff served on the FHCO's regional Fair Housing Advisory Team, which contributed to the completion of a Good Neighbor Guide to increase awareness and education and explore policy change supporting Fair Housing.
- 7) *Limited resources to assist lower income, elderly and indigent homeowners 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 and into nursing homes. To remedy this, the City funded the Homeowner Repair program through Housing Authority of Jackson County. Of the 16 households served, seven households consisted of female heads of household, four were seniors, and five were disabled. In addition, Rebuilding Together Rogue Valley served homeowner and renter households with disabilities, increasing safety and accessibility through modular ramps to allow for them to remain housed in place.

RVCOG's Home At Last program assists with providing permanent supportive housing to chronically homeless individuals with disabilities, increasing capacity to support an additional two individuals with housing and case management.

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 results. The City collects current lists of Board of Directors and notification of single annual audit from all agencies receiving CDBG funding. Audit tracking is maintained to ensure subrecipient's compliance with 2 CFR part 200. All projects are administered under procurement standards governed by 2 CFR part 200, subpart D and all capital improvement projects adhere to Federal Labor Standards. All records are maintained for a minimum of five years.

During the 2019 PY, onsite monitoring visits were delayed in response to the COVID-19 pandemic. Monitoring will resume soon with anticipated start date of January 2021, as City staff is developing a plan to conduct potential virtual monitorings. Monitoring sessions will include program eligibility, administration, reporting requirements, record keeping, client files, and financial reporting.

Staff continues to work with individual agencies to ensure efficiency and accuracy with reporting through the implementation of a customized comprehensive reporting platform, streamlining the documentation process and which can be tailored to each subrecipient, that includes a checklist; narrative with successes, challenges, and progress toward goals; voucher reimbursement request; grantee performance report to collect demographic and income data; and specific indicator report to collect specifics on individual cases, as deemed necessary.

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 Consolidated 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 Community Development Grants Commission (CDGC), now known as the Community Services and Development Commission (CSDC) and Housing Advisory Commission (HAC) hold monthly public meetings to solicit public feedback and formulate recommendations to Council. Notifications of all public meetings, 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. 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. Draft documents are made available on the City's website, at the City Recorder's office and through the Planning Department. All CDBG-related documents and records are maintained for a minimum of five years.

Citizen participation pertaining to the 2019/20 CAPER, referred to hereafter as the 2019 CAPER, was facilitated through a mandatory public comment period and two public meetings. The public comment period opened on November 17, 2020 and concluded on December 17, 2020. The CSDC held a meeting on December 2, 2020 to solicit citizen input and to approve the CAPER prior to submission to Council. City staff presented the CAPER during this meeting, and the CSDC passed a motion approving the CAPER, as presented by staff. City Council held a public hearing at Medford City Hall, Council Chambers, on Thursday, December 17, 2020 at 6:00 p.m. to solicit additional feedback and consider the CAPER for approval. City Council approved Resolution 2020-161 adopting the 2019 CAPER for submission to HUD.

No public comments were received.

The following Council actions relate to the 2019/20 Action Plan:

On June 18, 2020, Council approved Resolution No. 2020-83, authorizing the City of Medford CARES Act Amendment to the Program Year 2019 Action Plan.

On June 15, 2019, Council approved Resolution No. 2019-57, adopting the budget for the City of Medford for the biennium commencing July 1, 2019.

On June 6, 2019, Council approved Resolution No. 2019-41, adopting the 2019/20 Action Plan.

On September 20, 2019, Council approved Resolution 2019-112, adopting a fourth Supplemental Budget for the 2019-19 biennium.

On May 7, 2015, Council approved Resolution 2015-46, adopting the 2015-2019 Consolidated Plan. The public hearing was preceded by a 30-day public comment period.

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 CDBG program objectives were not altered during the 2019 PY. Consolidated Plan goals focus on improving and increasing affordable housing, improving access to public services and improving neighborhood conditions. Of the 16 strategies identified in the Consolidated Plan, the following three have not been implemented during the five years:

- Provide financial assistance to help potential low/moderate-income homeowners with down payment and closing costs – City contributes to homeownership through 15% of all construction excise tax revenue, which creates an ongoing funding source going to ACCESS;
- Support the creation of higher density, mixed-income and mixed-use housing in the redevelopment of the downtown area – experienced challenges with mixed-use housing and securing sufficient leverage due to other funding restrictions regarding income; and
- Support programs that provide loans and technical assistance to small businesses and promote development of mechanisms that will encourage micro-enterprise such as the creation of small business incubator – funded in PY 2020 through Southern Oregon University's Small Business Development Center (SBDC)

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

No.

Appendix A – Financial Summary

	Office of Community Planning and Development	DATE: 12-04-20
	U.S. Department of Housing and Urban Development	TIME: 14:49
	Integrated Disbursement and Information System	PAGE: 1
	PR26 - CDBG Financial Summary Report	
	Program Year 2019 MEDFORD , OR	

PART I: SUMMARY OF CDBG RESOURCES

01 UNEXPENDED CDBG FUNDS AT END OF PREVIOUS PROGRAM YEAR	247,926.85
02 ENTITLEMENT GRANT	715,527.00
03 SURPLUS URBAN RENEWAL	0.00
04 SECTION 108 GUARANTEED LOAN FUNDS	0.00
05 CURRENT YEAR PROGRAM INCOME	197,209.76
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	0.00
08 TOTAL AVAILABLE (SUM, LINES 01-07)	1,160,663.61

PART II: SUMMARY OF CDBG EXPENDITURES

09 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	346,158.87
10 ADJUSTMENT TO COMPUTE TOTAL AMOUNT SUBJECT TO LOW/MOD BENEFIT	235,835.75
11 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 09 + LINE 10)	581,994.62
12 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	66,003.85
13 DISBURSED IN IDIS FOR SECTION 108 REPAYMENTS	0.00
14 ADJUSTMENT TO COMPUTE TOTAL EXPENDITURES	56,003.94
15 TOTAL EXPENDITURES (SUM, LINES 11-14)	704,002.41
16 UNEXPENDED BALANCE (LINE 08 - LINE 15)	456,661.20

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	346,158.87
20 ADJUSTMENT TO COMPUTE TOTAL LOW/MOD CREDIT	235,835.75
21 TOTAL LOW/MOD CREDIT (SUM, LINES 17-20)	581,994.62
22 PERCENT LOW/MOD CREDIT (LINE 21/LINE 11)	100.00%

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 BENEFITTING 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	44,738.24
28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	0.00
29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	0.00
30 ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS	64,161.67
31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30)	108,899.91
32 ENTITLEMENT GRANT	715,527.00
33 PRIOR YEAR PROGRAM INCOME	185,401.33
34 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP	0.00
35 TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34)	900,928.33
36 PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35)	12.09%

PART V: PLANNING AND ADMINISTRATION (PA) CAP

37 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	66,003.85
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	56,004.06
41 TOTAL PA OBLIGATIONS (LINE 37 + LINE 38 - LINE 39 +LINE 40)	122,007.91
42 ENTITLEMENT GRANT	715,527.00
43 CURRENT YEAR PROGRAM INCOME	197,209.76
44 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PA CAP	0.00
45 TOTAL SUBJECT TO PA CAP (SUM, LINES 42-44)	912,736.76
46 PERCENT FUNDS OBLIGATED FOR PA ACTIVITIES (LINE 41/LINE 45)	13.37%

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
2018	2	421	6366663	Compass House - Property Renovation	03B	LMC	\$128,511.50
					03B	Matrix Code	\$128,511.50
2019	3	426	6366663	Rogue Retreat - Employment Training Through Cleaning Medford Streets	03T	LMC	\$7,329.00
					03T	Matrix Code	\$7,329.00
2019	2	429	6366663	Maslow Project - Safety Net and Case Management Services for Homeless Youth and Families (2019)	05D	LMC	\$12,042.15
2019	4	424	6366663	Hearts with a Mission - Shelter and Extended After Care	05D	LMC	\$15,000.00
2019	8	430	6366663	Youth 71Five Ministries - Vocational Training	05D	LMC	\$10,367.09
					05D	Matrix Code	\$37,409.24
2018	3	413	6366663	Housing Authority of Jackson County - Homeowner Repair 2018	14A	LMH	\$22,209.40
2019	5	425	6366663	Rebuilding Together Rogue Valley - Accessible Ramps for Medford Elders/Persons with Disabilities	14A	LMH	\$13,127.52
2019	6	428	6366663	Housing Authority of Jackson County - Homeowner Repair 2019 PY	14A	LMH	\$137,572.21
					14A	Matrix Code	\$172,909.13
Total							\$346,158.87

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
2019	3	426	6366663	Rogue Retreat - Employment Training Through Cleaning Medford Streets	03T	LMC	\$7,329.00
					03T	Matrix Code	\$7,329.00
2019	2	429	6366663	Maslow Project - Safety Net and Case Management Services for Homeless Youth and Families (2019)	05D	LMC	\$12,042.15
2019	4	424	6366663	Hearts with a Mission - Shelter and Extended After Care	05D	LMC	\$15,000.00
2019	8	430	6366663	Youth 71Five Ministries - Vocational Training	05D	LMC	\$10,367.09
					05D	Matrix Code	\$37,409.24
Total							\$44,738.24

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

Appendix B - Resolution 2020-161

RESOLUTION NO. 2020-161

A RESOLUTION adopting the City of Medford's 2019-2020 Consolidated Annual Performance Evaluation Report (CAPER), pertaining to Community Development Block Grant (CDBG) funds for the 2019-20 program year.

WHEREAS, each year the City develops and adopts a Consolidated Annual Performance Evaluation Report (CAPER) indicating how the activities funded during the program year ending June 30, 202 has met the needs identified in the City's Consolidated Plan for Housing and Community Development. The Consolidated Plan, adopted by Council on May 7, 2015, is a comprehensive planning document that identifies the City's overall housing and community development issues and outlines a five-year strategy to address those issues;

WHEREAS, U.S. Department of Housing and Urban Development (HUD) requires a public hearing to solicit citizen input regarding the City's CAPER, which describes use of CDBG funds for the 2019-20 program year and outlines the goals and strategies that have been met during this fifth and final program year; and

WHEREAS, City Council must approve the 2019-20 CAPER prior to submitting it to HUD for approval. The CAPER, in its entirety, is available in the City Manager's Office and, as required by HUD, is available for public comment for a 15-day period ending on December 17, 2020; now, therefore,

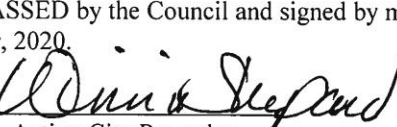
BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF MEDFORD, OREGON:

Section 1. The City Council hereby adopts the 2019-2020 Consolidated Annual Performance and Evaluation Report (CAPER), pertaining to Community Development Block Grant (CDBG) funds for the 2019-20 program year. The CAPER is on file in the City Recorder's Office.

Section 2. This Resolution shall become effective immediately upon its passage by the Council and approval by the Mayor.

PASSED by the Council and signed by me in authentication of its passage this 17th day of December, 2020.

ATTEST:


Acting City Recorder


Mayor

Resolution No. 2020-161