



**2017/18 Program Year
Consolidated Annual Performance Evaluation Report**

for the

**City of Medford
Community Development Block Grant Program**

July 1, 2017 through June 30, 2018

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

The 2017/18 program year (PY) marked the third year of the City of Medford 2015-19 Consolidated Plan. The City's major initiatives throughout the year focused on reducing barriers to development of affordable housing, implementing strategies to reduce homelessness, and addressing problem properties. City Council and several City departments have contributed to a building year that is expected to launch significant progress for years to come.

Under Council direction, Planning Department staff worked diligently throughout the year to identify and propose strategies that can **reduce the barriers to development of affordable housing**. Key strategies, as presented throughout this report, include increasing available land; generating a less restrictive funding source; implementing new targeted commissions; cultivating unique public-private partnerships; securing additional federal funds; and analyzing policy changes and economic incentive options for presentation to Council during the 2018/19 PY.

Planning Department staff also worked closely with the regional Continuum of Care (CoC) to help implement a region-wide, systematic approach to **addressing homelessness**. CDBG staff served on the CoC Interim Board for six months to restructure the CoC's organization and governance, which ultimately led to a new, higher-level Board where the City Manager assumed a leadership role as Executive Chair in January 2018. Shortly after, City Council followed with a \$30,000 grant to hire a new CoC Coordinator. This series of championing actions has sparked a whole new culture to collaboratively address homelessness across the region.

The City's interdepartmental approach to **addressing problem properties** has been empowered by Council actions including adoption of the International Property Maintenance Code, Receivership Ordinance and Chronic Nuisance Property Ordinance; approval of CDBG and Neighborhood Stabilization Program (NSP) projects; and active participation in community conversations. The Building Department and Code Enforcement Division implemented an interdepartmental collaboration with the Planning Department, Legal Department and City Recorder to target 96 properties. Of this number, 70 have been resolved, rehabilitated, or marked for rehabilitation or redevelopment to affordable housing. This key initiative has had a major impact on the city ranging from established public-private partnerships to a new-found demonstration of community giving and volunteerism.

Outside of CDBG staff time, the above initiatives triggered 2017/18 PY expenditures totaling \$186,176. Funded projects included the research and analysis of housing strategies, \$21,755; acquisition of a blighted property, \$98,051; rehabilitation of a blighted rental unit, \$25,000; demolition of a city-owned blighted property, \$40,570; and code enforcement activities to address blighted properties, \$800.

A lack of staff capacity to oversee or participate in the combination of these major initiatives plus new housing construction projects, CDBG and NSP housing rehabilitation projects, public facility rehabilitation, and monitoring public service programs has continued the City's recent trend for lower than anticipated outcomes. The City has increased capacity through additional staffing and contracting for specific services, which is expected to improve performance in the 2018/19 PY. The City will continue to look at additional staffing needs required to administer new development programs within the Planning Department.

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 2017/18 PY. The City exceeded expectations in the four categories summarized below:

Tenant Rental Assistance/Rapid Re-housing: St. Vincent de Paul slightly exceeded expected performance of 130 individuals by serving 137 through the Reducing Medford Homelessness in 2017 program. The individuals served are members of 63 households which was slightly short of the estimated 70. Anticipated performance is always an estimate based on previous years.

Homeless Prevention: The City, through estimations provided by Hearts with a Mission, Maslow Project, Center for Nonprofit Legal Services and St. Vincent de Paul, anticipated serving 1,648 individuals with services that seek to end or prevent homelessness. The actual number served in this category was 2,021; or 123% of the expectation. This variance is attributed to estimations made prior to the start of the program year.

Public Service Activities other than LMI Housing Benefit: Overall, the City served 1,930 citizens through CDBG funds not specifically targeted to a housing benefit. Four subrecipients produced an overperformance of 320, or 120%. The combined CDBG expenditure was \$51,810. This is mainly attributed to performance estimation during the grant application process. Maslow Project expected to serve 1,350 versus an actual of 1,732; Community Volunteer Network's Foster Grandparent program 32 versus 33; Center for Nonprofit Legal Services' Fair Housing program 28 versus 41; and Consumer Credit Counseling's Credit Report and Budgeting program 200 versus 124.

Public Facility and Infrastructure Activities other than LMI Housing Benefit: The City had \$366,672 in available resources for this category, of which \$235,267.25, or 64% was expended. Projects that fully expended and met or exceeded HUD reported anticipated performance included the Public Works Neighborhood Infrastructure project, Jackson Park ADA Upgrade, Union Park ADA Upgrade and demolition of City-owned 1615 Thomas Road. The City exceeded performance of public infrastructure and parks development projects with an expected 2,376 households versus an actual amount of 6,585. This resulted from an underestimation of eligible households living in the impacted neighborhoods. HUD's ArcGis mapping tool identified 5,609 additional households in all four block groups/tracts. The City met expectations in the demolition of blight category with one completed property at 1615 Thomas Road.

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

Public Facility Improvements: The Medford Senior Center (MSC) facility improvement project was carried forward to the 2018 PY because of delays during the procurement process. Construction began in September 2018 and is expected for completion by the end of the year. The originally estimated 1,200 membership will most likely be adjusted to approximately 400 given a more accurate member tracking system implemented by the City Parks and Recreation Department. MSC expended \$13,754 of the awarded \$118,070 during the program year to pay for environmental studies and architectural design. The City will report performance in the 2018 CAPER.

The Children's Advocacy Center was originally awarded \$21,300 for the completion of an entry porch repair project that would also bring the facility up to ADA standards. This project was delayed because of City staff capacity with completing the environmental review. The City contracted with Camas Consulting to conduct the environmental review and bring the project back on track for completion in the 2018 PY second quarter. This project contract value was increased by \$2,500 to cover environmental review costs. Performance will be reported in the 2018 CAPER.

Public Infrastructure Activities for LMI Housing Benefit: The City was not able to meet its targeted goal of 151 housing units produced or benefitted through public infrastructure funding which involved two projects with Housing Authority of Jackson County (HAJC). The agency's 2017 project to modernize the 87-unit complex at 726 Royal Street was finished during the program year using \$48,975 in CDBG funds. However, the agency's 64-unit new construction rental project on Ross Lane was not able to begin because of delays with environmental issues associated with adjacent orchard and flood plain mitigation requirements. This project was issued a Notice to Proceed from the City in October 2018. Off-site construction will begin in November 2018.

Affordable Housing Added: Habitat for Humanity's (HfH) acquisition for construction of three new homeowner units experienced delays associated with the substantial amendment process after HfH requested an expanded scope from acquisition/rehabilitation of one blighted unit to acquisition/demolition/construction. The project suffered additional delays when a leaking underground storage tank (LUST) was discovered at a site upgradient to the property during the environmental review process. Both issues have since been resolved and the project is back on track.

Homeowner Housing Rehabilitated: The City's completion of existing homeowner rehabilitations fell short because of a greater than expected return of program income during the 2016 and 2017 program years, higher average construction costs per home than expected and a shortage of construction labor. The Homeowner Repair Program, administered by HAJC, completed 13 of the 22 anticipated home repairs during the 2017 PY. Like stated above, the anticipated amount was not achieved due to increasing construction costs and the extensive nature of the 13 repairs, including two large projects that began in the 2016 PY year but were not completed as of the year's end.

Rental Housing Rehabilitated: PeopleFirst Properties encountered a delay with securing contractors that could complete rehabilitation of one rental unit at 128 Chestnut Street on time and within budget. This carried completion to September 2018. The unit is now rented to First Presbyterian

Church for the benefit of three individuals recovering from addiction. Performance will be reported in the 2018 CAPER.

Code Violations Resolved: The City addressed four of the proposed seven blighted properties through Code Enforcement activities utilizing \$800 in carry-forward CDBG funds. Inter-departmental collaborations with Building Safety, Code Enforcement, Planning, and Legal resulted in the resolution of an additional 70 units through the work of the Receivership Program, Neighborhood Livability Partnership, public-private partnerships and other CDBG and NSP rehabilitation projects. Given the complexity of this process and limited staff capacity, a conservative approach to expending CDBG funds has been taken during the past two program years. However, improved understanding of the system and increased staffing capacity is expected to elevate performance in the next program year.

The City expects to meet or exceed all but two of the expected performance categories within the 2015-19 Consolidated Plan period as illustrated on page 6, Table 2. The only exception is **Buildings Demolished**. During the consolidated planning process, the City's consultant took an aggressive approach when estimating 27 expected buildings. This was mainly due to the large original investment of over \$150,000 during the 2015/16 PY, with seven properties expected in the first year and five each year thereafter. Given the legal complexities associated with this type of activity, City staff took a more conservative approach to expending CDBG funds until a consistent system was developed. Although performance will technically fall short as recorded, the City is extremely pleased with the progress made to address problem properties through the variety of tools referenced in the previous paragraph.

The other area of Consolidated Plan shortfall will be with **Homeless Person Overnight Shelter** due to a misestimation made by Hearts with a Mission during the 2015/16 PY. The agency estimated 375 persons annually but included family members of the youth served through the city's only emergency youth shelter. Since then, City staff has worked with the agency to adjust annual performance estimations resting at 100-150 sheltered youth, annually.

Table 1 - Accomplishments – 2017/18 Program Year

Goal	Description	Indicator	Expected Outcome	Actual Outcome	Unit of Measure	Percent Complete
1	Affordable Housing - <i>Objective 1</i>	Homeowner Housing Rehabilitated - Homeowner Repair 2016 (5) - Homeowner Repair 2017 (8)	22	13	Housing Units	59%
1	Affordable Housing - <i>Objective 1</i>	Rental Housing Rehabilitated - PeopleFirst Properties (0)	1	0	Housing Units	0%
1	Affordable Housing - <i>Objective 2</i>	Public Facility/Infrastructure Activities for LMI Housing Benefit - Housing Authority Royal Apartments (87) - Housing Authority Newbridge (0)	151	87	Households	57.6%
		Homeowner Housing Added - Habitat for Humanity 1026 W 10 th Street (0)	3	0	Housing Units	0%
		Tenant Rental Assistance/Rapid Rehousing - St. Vincent de Paul (137)	130	137	Household	105%
		Homeless Person Overnight Shelter - Hearts with a Mission	140	111	Persons	79%
		Homeless Prevention - Hearts with a Mission (111) - Maslow Project (1,732) - Center for Nonprofit Legal Services (41) - St Vincent de Paul (137)	1,648	2,021	Persons	123%
2	Public Services - <i>Objective 1</i>	Public Service Activities other than LMI Housing Benefit - Maslow Project (1,732) - Community Volunteer Network (33) - Center for Nonprofit Legal Services (41) - Consumer Credit Counseling (124)	1,610	1,930	Persons	120%
3	Community Development (Non-Housing) - <i>Objective 1</i>	Public Facility or Infrastructure Activities other than LMI Housing Benefit - Medford Senior Center (0) - City Neighborhood Sidewalks (4,230) - City Jackson Park (1,250) - City Union Park (1,105) - Children’s Advocacy Center (0)	2,376	6,585	Persons/ Households	277%
		Buildings Demolished - City 1615 Thomas Road	1	1	Buildings/ Structures	100%
		Code Violations Resolved - City Interdepartmental	7	4	Properties	57%

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	41	Housing Units	54%
			Rental Housing Rehabilitated (<i>not in ConPlan</i>)	1	0	Housing Units	0%
1	Affordable Housing - Objective 2	\$35,000	Public Facility or Infrastructure Activities for LMI Housing	50	136	Households	272%
			Homeowner Housing Added	3	2	Housing Units	N/A <i>*Not listed in ConPlan</i>
			Tenant-based Rental Assistance/Rapid Rehousing	7	91	Households <i>*Listed as persons in Action Plan</i>	1,300%
			Homeless Person Overnight Shelter	1,875	355	Persons	19%
			Homeless Prevention	1,614	3,709	Persons	N/A <i>*Not listed in ConPlan</i>
2	Public Services - Objective 1	\$434,025	Public service activities other than LMI Housing Benefit	7,166	7,736	Persons	108%
3	Community Development - Objective 1	\$2,056,280	Public Facility/ Infrastructure other than LMI Housing Benefit	6,030	8,635	Persons	143%
			Buildings Demolished	27	5	Buildings/ Structures	19%
			Code Violations Resolved	0	15	Properties	N/A <i>*Not listed in ConPlan</i>

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 2017/18 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 2017 PY included no-interest loans for rehabilitation, financial assistance for rent payments and deposits, financial assistance for property acquisition, support for programs that help homeless transition to permanent supportive housing, and funding for the completion of a housing strategy study to help reduce barriers to affordable housing.

Major, Minor and Emergency Homeowner Repair: The City, through its Homeowner Repair Program administered by HAJC, expended \$334,362 in 2016 and 2017 entitlement funds to provide zero-interest, deferred loans to 13 LMI homeowners in need of rehabilitation to correct hazards and conditions affecting health and affordability. Five homes were improved to meet an Energy Star rating, 12 were brought from substandard to standard condition, three were made ADA accessible, and six owners were senior citizens. 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.

Rental Housing Infrastructure Repair: Although not specifically identified as a strategy under Goal 1, HAJC completed a parking lot improvement project at the Royal Apartments affordable housing complex that provides 87 rental units. Tenants were dealing with limited accessibility and parking during the wet months due to failing water lines and insufficient catch basins. Spending \$48,974.92 on this project will improve the living conditions and safety of one of the city’s oldest and largest existing affordable rental complexes.

Homeless Person Overnight Shelter: The City has supported Hearts with a Mission, the city’s only youth emergency homeless shelter, for all three years of the consolidated plan period. In 2017, the agency received \$17,951 to support operations that served 111 unduplicated youth.

Homeless Prevention: The City addressed homelessness by supporting five agencies with a combined \$74,857 of which included: 1) St. Vincent de Paul’s rental assistance program with \$20,903 to serve 63 households consisting of 82 adults and 55 children; 2) Hearts with a Mission’s Emergency Youth Homeless Shelter with \$17,951 to serve 111 youth; 3) Maslow Project’s Wrap-Around Case Management program with \$22,440 to serve 1,732 youth and family members; and 4) Center for Nonprofit Legal Services with \$13,563 to serve 41 participants with fair housing legal assistance.

Affordable Housing Property Acquisition: HfH acquired 1026 W. 10th Street to build three new townhouse style units serving homebuyers ≤ 80% AMI. Total project cost to date is \$117,157 including CDBG contributions of \$98,051. Demolition and construction will begin in the 2018 PY.

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 of \$94,444 to six nonprofits addressing priority needs including homeless prevention services; rapid re-housing assistance; emergency shelter services; senior and youth services; fair housing education and legal services; and counseling services to improve financial health. Overall, these agencies collectively served 2,178 individuals with public services aimed at increasing self-sufficiency.

In addition to the four agencies referenced above as providing services to directly or indirectly address homelessness, the City provided a combined \$14,793 to two programs offering services to help participants become or remain self-sustaining. Consumer Credit Counseling Service of Southern Oregon expended \$4,620 to serve 124 residents with credit report counseling sessions to discuss their debts, judgements, score and financial situations. Community Volunteer Network expended \$10,172 to administratively support the Foster Grandparent Program which placed 33 volunteer seniors in local elementary schools and child care facilities to provide mentorship to youngsters at various stages of development.

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: provide assistance to repair and improve public infrastructure; provide assistance to develop neighborhood parks; support the removal of dilapidated structures; and actively enforce City codes to improve habitability and safety of housing and eliminate blight.

Public Infrastructure: The City Public Works Department installed 2,100 linear feet of new 5 foot wide sidewalks in neighborhoods serving Washington and Howard elementary schools. In addition, 16 driveway approaches were installed, 665 curb and gutters, 252 feet of 3 foot wide drainage pipe, nine ADA ramps and 48 linear feet of retaining wall. The City expended \$136,643.07 from 2015 PY entitlement funds during the program year. According to HUD's ArcGis mapping tool, a total of 4,230 households will benefit from these improvements across two block groups.

As mentioned under Goal 1, HAJC completed a parking lot infrastructure project at 726 Royal Avenue under HUD's matrix code Public Housing Modernization. The 87 residing tenants will benefit from improved accessibility and safety through the installation of three catch basins to allow storm water runoff and debris to be caught and to prevent future flooding; and the replacement of water lines.

Neighborhood Parks: The City Parks and Recreation Department upgraded two LMA neighborhood parks. Union Park was awarded \$8,500 to install three ADA ramps, two picnic tables and a disc swing. The number of LMA families expected to benefit from this project, according to the HUD's ArcGIS

mapping tool, is 1,105. Jackson Park received \$32,500 to install four ADA compliant picnic tables, three ramps, and one drinking fountain. An ADA pathway was also constructed for improved accessibility and connectivity. These park improvements are expected to directly serve approximately 2,350 of Medford’s LMA families.

Dilapidated Structures: As referenced in CR-05, the City met its goal of demolishing one blighted property by expending \$40,570 to take down City-owned 1615 Thomas Road. Prior to demolition, the property imposed a neighborhood safety risk as well as opposed Council’s five-year priority of ridding the community of blight.

Enforce City Codes: The City addressed four property code violations through Code Enforcement activities. Of the \$6,089 available, \$800 was spent on property title searches. The remaining project funds will be carried forward to the 2018 and 2019 program years to address additional properties.

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	1,911
Black or African American	99
Asian	12
American Indian or American Native	73
Native Hawaiian or Other Pacific Islander	49
Total	2,144
Hispanic/Latino	655
Not Hispanic/Latino	1,492

Narrative

During the 2017/18 PY a total of 2,278 people were assisted through public service agencies and housing related projects funded by the City’s CDBG program to offer youth services, senior volunteer opportunities, emergency rental assistance, budgeting and credit report services, and legal aid and education. The number in Table 3 reflects those identifying as a **single race only**. The total of single race beneficiaries was 2,144, of whom 655, or 30.5% were Hispanic. An additional 134 mixed-race individuals were also served through these programs, which are not reported in the IDIS-generated, non-editable table above. Within these additional 134 beneficiaries, 42, or 31%, were Hispanic.

Included in the table is race and ethnicity data for 100 beneficiaries of housing related projects through the City’s CDBG Homeowner Repair Program and rental property public housing modernization project, both through HAJC. A total of 13 households benefitted from homeowner rehabilitation opportunities, 100% of whom were White, Non-Hispanic. Of the remaining 87 tenant household beneficiaries, all reported as **single race only** with 82 White, 3 Black/African American, 1

American Indian/Alaskan Native, and 1 Native Hawaiian/Other Pacific Islander. Fourteen (14) or 16% of this subpopulation identify as Hispanic/Latino.

CR-15 - Resources and Investments 91.520(a)

Identify the resources made available

Table 4 – Resources Made Available

Source	Resources Made Available	Amount Expended During Program Year	Remaining Resources
2017 Entitlement	629,629.00	367,003.80	262,625.20
2016 Entitlement	396,574.37	169,898.10	226,676.56
2015 Entitlement	183,272.07	183,272.07	0.00
Pre-2015 Entitlement	154,799.58	65,630.50	89,169.08
Program Income (2017)	234,608.71	190,035.42	44,573.29
TOTAL RESOURCES:	\$1,598,883.73	\$975,839.89	\$623,043.13

Narrative

Resources made available and amounts expended during the 2017/18 PY were drawn from HUD’s Integrated Disbursement and Information System (IDIS). Amounts are broken down by program year as associated with each project/program active during the reporting year. These amounts have been verified by CDBG and Finance Department staff based on actual IDIS drawdown voucher numbers and other reports available in IDIS. The CDBG program year runs July 1 through June 30. The HUD PR26, CDBG Financial Summary, illustrated in Appendix A reflects adjustments for drawdowns that were processed outside of the 90-day grace period following the program year end of June 30, 2018. The PR26 includes line details for the 2017/18 PY as well as for transactions that recorded after the 90-day grace period into the 2018/19 PY.

Identify the geographic distribution and location of investments

The City of Medford did not utilize target areas for distribution of CDBG funds under the 2017/18 Action Plan. However, the chart below illustrates actual percentages of the allocation of expended CDBG funds excluding program administration during the 2017/18 PY.

Table 5 – Geographic Distribution and Location of Investments

Target Area	Planned Percentage of Allocation	Actual Percentage of Allocation	Narrative Description
CDBG Eligible Block Groups	N/A	20.96%	Eligible Census Tract/Block Benefit
Citywide	N/A	74.27%	LMI Individual Benefit
Citywide – Spot Blight	N/A	4.77%	Benefit Areas on a Spot Blight Basis

Narrative

Citywide Spot Blight is not showing in IDIS as a separate category, but staff is working with the IDIS help desk for clarification. The City Thomas Road Demolition project, expending \$40,570.22 of the total 2017 PY project expenditures of \$850,494.14 (excluding Program Administration) accounted for 4.77% of the geographic distribution.

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 sources during the 2017/18 PY included foundations, other federal, other state/local, 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 \$850,494.14. These projects provided a combined expended leverage of \$2,886,565. Among the leverage sources, foundations accounted for 14.91% of the total leverage; other federal funds, 10.16%; other state or local, 25.39%; private contributions, 39.28%; and program fees or dues, 10.26%.

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	0	0
Number of Non-Homeless households to be provided affordable housing units	68	0
Number of Special-Needs households to be provided affordable housing units	12	0
Total	80	0

Table 7 – Households Provided Affordable Housing Support

	One-Year Goal	Actual
Number of households supported through rental assistance	70	63
Number of households supported through the production of new units	67	0
Number of households supported through rehab of existing units	19	13
Number of households supported through acquisition of existing units	3	0
Total	159	76

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

As per HUD clarification, Table 6 should include production of new housing units, **only**. This was confirmed during completion of the 2016/17 CAPER when staff discovered IDIS data entries also included expectations related to affordable housing support services.

Number of homeless households to be provided affordable housing units: The City has not received any applications for projects to produce permanent housing for homeless households during this consolidated plan period. However, given heightened regional awareness and increasingly available financial resources, the City anticipates requests in subsequent program years.

Number of non-homeless households to be provided affordable housing units: The City was not able to accomplish its goal of 68 units for non-homeless households due to environmental and construction delays of three projects. Explanations are provided below.

HAJC will begin construction of 64-unit Newbridge Place during the 2018 PY with a completion in the 2019 PY. This project experienced a lengthy delay in receiving Notice to Proceed because of environmental issues associated with adjacent orchard mitigation and FEMA approval of a CLOMR. These issues have since been resolved and offsite construction will begin in October 2018.

HfH acquired the existing unit at 1026 W 10th Street in July 2017 and went through the substantial amendment process to convert the property to three new homebuyer units in May 2018. This project also experienced lengthy environmental delays when a LUST was discovered at an upgradient elementary school site. This issue was resolved in October 2018 and the project is now back on track with completion anticipated during the 2019 PY.

PeopleFirst Properties encountered a delay with securing contractors that could complete the rehabilitation of one rental unit at 128 Chestnut Street on-time and within budget. This carried completion to September 2018. The unit is now rented to First Presbyterian Church for the benefit of three individuals recovering from addiction.

Number of special-needs households to be provided affordable housing units: The 12 units expected to serve special-needs households are associated with the 68 units referenced above. This estimation will be finalized after occupancy is recorded for each project.

The above narrative also relates to shortfalls reported in Table 7 under production of new units and acquisition of existing units. Please see explanations below for the other two categories:

Number of houses supported through Rental Assistance: As illustrated in Table 7, rental assistance performance fell short by seven households. However, performance exceeded by this same number when tracking individual members of households as illustrated in Table 1. Both variances are attributed to estimation.

Number of households supported through rehab of existing units: Number of households supported through rehab of existing units: The amended 2017 Action Plan identified 18 owner units and one rental unit. The City fell short on the first mark as a result of higher construction costs and bigger rehab projects. The rental unit was delayed because of a lack of construction labor willing to complete the job within budget. The rental unit was finished in September 2018.

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. 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 Persons Served

Number of Persons Served	CDBG Actual	HOME Actual
Extremely Low-income	153	n/a
Low-income	99	n/a
Moderate-income	194	n/a
Total	446	n/a

Narrative Information

Agencies contributing to the numbers above include Community Volunteer Network, Center for Nonprofit Legal Services, Consumer Credit Counseling, St. Vincent de Paul and HAJC. As reflected in Table 7, 43.5% of those served earned a moderate income ($\leq 80\%$), 34.3% earned an extremely low income ($\leq 30\%$) and 22.2% earned a low income ($\leq 50\%$).

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 2017/18 PY, the City awarded \$75,872, or 80.3%, of the allowable CDBG public service allocation of \$94,444 to four agencies with an objective of reaching out to homeless persons. Supporting St. Vincent de Paul, Maslow Project, Hearts with a Mission and Center for Nonprofit Legal Services helped the City achieve performance outcomes by collectively serving 2,021 individuals.

St. Vincent de Paul's 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 \$20,903.41 served 63 families consisting of 82 adults and 55 children. Beneficiaries included 45 persons that were homeless at the time of service, 36 female heads of household, 34 persons with disabilities and 18 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's Wrap-Around Supportive Services for Homeless Youth and Families program was awarded \$22,440 to supplement a portion of staffing expenses to serve 1,732 unduplicated eligible clients through the Medford Resource Center. Of these clients, 1,279 were reported homeless when they entered the program, and the remaining 453 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. Other services included: SNAP benefits; children's dental clinic; crisis intervention counseling; harm reduction and life skills; tutoring and mentoring; transitional services designed to find housing, pursue continuing education, or seek employment opportunities; and connection to adult role models and mentors. Of the 1,732 served through CDBG, 920 were female heads of household, 161 were persons with disabilities and one was a senior citizen.

Hearts with a Mission's Shelter and Safety Net Services program received \$17,951 to provide shelter, case management, counseling and educational support to 111 unduplicated youth. Combined, these youth benefitted from a total of 5,728 nights of safe sheltering and approximately 17,170 healthy meals and snacks. The City's CDBG award expanded their services to include additional support for families of the youth they serve through a community outreach effort. The project administered a variety of safety net services that addressed immediate basic needs, decreased at-risk behaviors, prevented abuse (or provided treatment to victims of abuse) and removed barriers to academic/employment success. Other services included family reunification and/or matching youth with host families. Among the 111 served through the CDBG program, 72 were female heads of household.

Center for Nonprofit Legal Services' (CFNPLS) Furthering Fair Housing program was awarded \$13,563 to cover legal staffing costs associated with outreach and legal education to protected classes. Among the 41 served, six were homeless at the time of service and 35 requested services to avoid homelessness. Services included representation 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. CFNPLS participated in the annual homeless outreach event (Project Community Connect) with the purpose of providing legal services to those experiencing or at risk of homelessness in Jackson County.

Outside of CDBG funding, the City assumed a crucial role in strengthening the CoC to target the housing and support needs of chronically homeless. During the 2017 CDBG grant competition, the Housing and Community Development Commission awarded bonus points to applications that proposed projects or programs in alignment with the CoC and that participated in or established an intention to participate in the Homeless Management Information System (HMIS). Establishing this priority stimulated more agencies to track data through HMIS and also encouraged a functioning Coordinated Entry System (CES). The CoC Coordinator reported an increase in the number of agencies and organizations using HMIS to 15. Also, due to increased collaboration and case conferencing between Veteran and Non-Veteran Housing providers, in one quarter's time, 180 chronically homeless households were removed from the Veterans list and 194 households were removed from the Non-Veterans list. These types of highlights demonstrate the power of a high-functioning CoC.

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

In coordination with local non-profit agencies the City prepared for the adoption of municipal code language (Ord. 2018-113) to allow for the use of buildings as temporary shelters when managed by a non-profit, church, government agency or similar agency. The adoption was recommended on June 14, 2018 by the City's Planning Commission. Temporary shelters, as defined in Code, are a temporary shelter within a building for 90 days (with an allowance for extension to a total of 180 days) in a year; the intent of the shelter use is to allow organizations to create a shelter for short-term use to allow for relief from extreme weather conditions for the homeless and other disadvantaged populations in Medford. The adopted language has a prescriptive process for organizations to follow and guarantees certain land use rights for operators of temporary shelters who are approved through said process.

The City worked closely with Rogue Retreat to refine operations of the Kelly Shelter during its second year of operation of January 2018 through March 2018. Significant changes included: 1) operating more like a transitional shelter; 2) replacing volunteers with 24/7 paid staff including a designated shelter case; 3) developing a discharge system to move residents to permanent housing; 4) coordinating with local churches during the day to serve as day centers; and 5) participating in HMIS/CES. The Shelter provided warmth and safety to 131 (100 men, 31 women) chronically homeless guests (17 Veterans) and successfully assisted 40 guests to transition into more permanent housing situations. The Kelly Shelter provided 13,650 meals, helped 41 people get signed up for OHP, assisted four guests successfully enroll in college, assisted five guests with Domestic Violence Assistance and assisted one guest with obtaining immigration papers.

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.

Six public service agencies collectively expended \$90,665, serving 2,178, targeting low-to moderate-income individuals and families at risk of becoming homeless. Services provided by St. Vincent de Paul, Maslow Project, Hearts with a Mission and Center for Nonprofit Legal Services were summarized in the previous section. Consumer Credit Counseling Services of Southern Oregon and Community Volunteer Network joined this initiative by providing unique, one-of-a-kind services.

Consumer Credit Counseling Service was awarded \$7,480 to fund the Credit Report Counseling for the Low-Income Community Members program. Funding was allocated to cover staffing costs and credit reports to provide counseling sessions on repairing credit scores, managing debt, addressing judgements, and implementing a personal budget. The agency expended \$4,620 to serve 124 persons, of which one identified as homeless.

Community Volunteer Network was awarded \$10,172 to cover administrative costs associated with the Foster Grandparent program. This program is a unique program connecting volunteer senior citizens with youth in need of mentorship at local elementary schools and child care organizations. Thirty-three seniors participated in the program, many of which accepted a small stipend that often helps secure or sustain income and/or manage personal budgets to maintain housing.

Additional performance data for each subrecipient is listed below:

St. Vincent de Paul: Among the 137 persons served, 45 transitioned from homelessness to permanent housing and 92 were helped from becoming homeless. Thirty-six were female head of household, 34 persons with disabilities and 18 were seniors.

Maslow Project: Of the 1,732 youth and family members served, 1,279 were either homeless or at risk of homelessness after being discharged from foster care, corrections programs or other youth facilities. Among the homeless, 190 were connected with temporary shelter or permanent housing. Nine hundred twenty were female head of household, 161 reported a disability, and one was a senior.

Hearts with a Mission: All 111 youth were homeless and 72 were female head of household. Twenty-one percent were discharged from DHS, 4% from hospitals, 6% from schools, 5% from churches, 15% from family or friends, 21% from other community agencies and 28% were self-referred.

Center for Nonprofit Legal Services: Among the 41 served, 27 were female head of household, 17 were seniors and seven reported a disability.

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 six public service agencies receiving CDBG Public Service Program funds served 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 2017/18 PY: 1) Maslow Project placed 82 individuals in shelter or safe temporary housing and 67 in permanent housing; 2) St. Vincent de Paul transitioned 20 families or 45 persons out of homelessness into permanent rental housing; and 3) Hearts with a Mission reunified 104 of the 111 homeless youth served with their families or with a safe alternative.

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

Actions taken to address the needs of public housing.

The 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," will provide 64 new units when completed in the 2019/20 PY. Both complexes will be 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.

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)

Medford has become a more collaborative, solutions-based community. The following are examples of City actions taken during the 2017/18 PY to address barriers to affordable housing:

- 1) In the fall 2017 the City developed a Housing Advisory Committee (HAC) to carry out the commitment of Medford to complete a housing strategy by March 2018. The HAC was tasked with recommending strategies to remove cost barriers to the development of affordable housing for low- to moderate-income households. With this recommendation the HAC reviewed 21 economic incentives and 20 regulatory policy reform options. A few of the high priority strategies included Construction Excise Tax, Multi-unit Property Tax Exemption, establishment of a permanent Housing Advisory Committee, creation of clear residential design standards, reevaluating the City's residential zones, incentives for development of Accessory Dwelling Units and allowance for cottage housing.
- 2) Jackson County Board of Commissioners adopted Ordinance No. 2017-11 on August 2, 2017, approving a Major Comprehensive Plan Amendment to add approximately 4,046 acres to the City of Medford Urban Growth Boundary (UGB) including the City's changes that were enacted by Council Bill 2016-99. On September 7, 2017, the City Council approved Ordinance No. 2017-102, adopting revisions to the UGB Amendment to align the City's and County's findings of fact, conclusion of law, and record of proceedings. Both ordinances addressed newly available land supply and density maximums that limit the number of units buildable on a given parcel of land.
- 3) City Council approved the Affordable Housing Construction Excise Tax on February 15, 2018, authorizing the City to collect a tax of one-third of one percent of the improvement value on building permits for residential, commercial, and industrial improvements to provide funding for affordable housing in the city of Medford. This action will provide a dedicated funding source of approximately \$500,000 annually (based on a 10-year historic analysis) that is likely to benefit smaller builders and developers. This action may also provide a continued funding source for construction projects through economic downturns.

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

- 1) On June 21, 2018 the City Council adopted ordinance No. 2018-73, which established the creation of the Community Development Grants Commission (CDGC). The CDGC, as defined by code, is tasked with acting as an advisor to the City Council on the appropriate implementation of the City's CDBG program, General Fund Grant Program and related programs and statutory responsibilities. The commission is also responsible for addressing the

obstacles to meeting underserved needs by being responsible for administering the CDBG grant selection process, implementing the CDBG Citizen Participation Plan, overseeing General Fund Grant reporting, and working with the Housing Advisory Commission in implementing the City's Consolidated Plan, Annual Action Plan, and Analysis of Impediments to Fair Housing Choice.

In order to maintain outreach to the needs of all those underserved, the commission's voting members are comprised of various 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. The holistic approach was designed to have representation from multiple areas that directly interact with meeting underserved needs. This commission will also work directly with the Housing Advisory Commission to help prioritize the affordable housing needs of underserved residents of Medford.

- 2) During the previous program year, Council designated 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 a contract with Rogue Retreat to manage the transitional housing campground referred to as Hope Village. On July 5, 2018, under Resolution 2018-83, Council extended that contract for two years and allowed for the addition of 16 units (eight duplexes).

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 440 homes. Among the 13 homes rehabilitated in the 2017 PY, 10 were built prior to 1978. HAJC reported 12 of these homes were in substandard condition prior to rehabilitation, and no projects involved lead disturbance.

During the development of the 2018 Action Plan, City staff contacted Jackson County Health and Human Services and the Environmental Public Health - Center for Health Protection Division of the Oregon Health Authority (OHA) to develop effective partnerships to support the improvement of the housing conditions for Medford citizens. Collaboration began with OHA Environmental Public Health Research Analyst David Dreher, in locating and evaluating pertinent data concentrated in the Medford area. This work narrowed the focus of attention to tenants living in properties built prior to 1950, with the possibility of lead-based paint contamination currently occupied by children under the age of six. During the 2017 PY, OHA confirmed eight cases of hazardous lead exposure in children this

age. City staff also met with OHA Lead Program Coordinator Ryan Barker, based out of Portland, Oregon. Ryan Barker provided specialized education which continued the discussion of the dangers of continued exposure to lead-based paint and dust and the possible lifelong debilitating health issues, the rate and severity of which increase exponentially the earlier in a child's life the exposure begins. OHA sent approximately 300 notification letters and educational materials to property owners and property managers responsible for properties within the City of Medford that are likely to contain lead-based paint and dust. Further collaboration will occur to identify additional responsible parties that should be notified of the likelihood of the presence of lead-based paint and the potential health risks resulting from exposure. Because of 2017 research and analysis, the City will launch a 2018-19 search for funding sources to provide education to the community and support abatement of confirmed lead-based paint hazards located in occupied residential properties.

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 2017/18 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: Six public service agencies receiving CDBG support during the 2017/18 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, credit report repair and personal budgeting, and emergency rental housing assistance. Investing \$94,444 (expending \$90,665) in public services referenced under CR-05 aided 2,178 families or individuals to help manage or overcome poverty.

Affordability of Owner-Occupied Units: The City's Homeowner Repair Program served 13 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 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 the General Fund Grant programs. The City's role in improving institutional capacity during the 2017 PY focused on: 1) continuing to play an integral role in reducing homelessness by funding the new CoC Homeless Coordinator position with \$30,000 from the City's General Fund; 2) supporting a new CoC governance structure with the Medford City Manager assuming the role of CoC Board Chair; 3) establishing a new partnership with HAJC where the City has agreed to serve as the Responsible Entity under all environmental laws and authorities to help facilitate development of affordable housing; 4) appointing City staff to serve on the CoC Housing Pipeline Workgroup; 5) providing

technical assistance to agencies including Habitat for Humanity, Hearts with a Mission, Housing Authority of Jackson County, Maslow Project, Center for Nonprofit Legal Services, St. Vincent de Paul, PeopleFirst Properties, Rogue Valley Youth for Christ, Consumer Credit Counseling Services and Compass House to help achieve consolidated plan goals through collaborative community leveraging and project development; and 6) developing relationships with local real estate agencies to help facilitate property acquisitions for development of housing and vocational training.

As indicated previously, Council also established the Community Development Grants Commission (CDGC) to act as an advisor to the Council on the appropriate implementation of the City's CDBG and General Fund Grant programs. The commission will also seek to increase institutional structure through collaboration with local organizations and community members to examine various topics that impact the community.

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

In response to community feedback, and to streamline the application and development process of affordable housing projects, City staff developed a pilot program designating one staff member as a liaison between City departments throughout the entire process. This allows subrecipients, developers, builders and involved parties to communicate with one city employee regarding any concerns about the project. The liaison will facilitate communication among departments, share information, report findings, and ensure regulatory compliance. The liaison brings a background of experience working in multiple departments of a municipality and provides an understanding of navigating through the various steps of development. This program will be evaluated during the 2018-19 PY to determine the time commitment and value it provides applicants.

The City successfully cultivated a public-private partnership with PeopleFirst Properties, ACCESS and First Presbyterian Church to convert 128 Chestnut Street to permanent supportive housing for veterans and/or individuals transitioning from addiction. Prior to the partnership, the property was designated as blight. PeopleFirst Properties shares the City's vision to increase fair affordable housing through conversion of the existing blighted inventory. Medford City Council awarded PeopleFirst Properties with \$25,000 from an underperforming 2015 CDBG project to rehabilitate the unit for reuse as rental housing. ACCESS leveraged the City's investment with over \$16,000 in weatherization funding and agreed to provide rental assistance to a low-income household referred under their Supportive Services for Veteran Families program. City efforts to connect agencies and resources, as well as better engage the faith-based community helped cultivate this new partnership, which ultimately began during 2016 City-sponsored homeless and affordable housing community outreach events.

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)

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 implemented the Affordable Housing Construction Excise Tax to provide a dedicated funding source for the development of affordable homes and programs. The City also established a relationship with the HAJC where the City will assume the role of Environmental Responsible Entity for properties prerequisite to applying for federal funding.
- 2) *Increased public awareness of fair housing rights*: The Center for Nonprofit Legal Services expended \$13,563 in 2017 CDBG funds to conduct outreach and provide legal education to protected populations about fair housing laws. These funds partially covered attorney's fees to provide civil legal representation to protect affordable, safe and fair housing for Medford's most vulnerable residents. Forty-one Medford residents were served including 27 female heads of household, seven persons with disabilities, 17 seniors and 6 homeless individuals. Along with this, 20 of those served reported earning an income \leq 30% of the gross AMI, 12 \leq 50%, and 13 \leq 80%.

During the April 5, 2018 City Council meeting, Medford Mayor Wheeler read a proclamation through which he proclaimed April 2018 to be Fair Housing Month as well as the 50th anniversary of the Fair Housing Act.

- 3) *Increased efficiency of public transportation and mobility*: Rogue Valley Transit District (RVTD) continues to improve transportation options to low income populations. In 2017, Route 25 to southwest Medford was increased to 30-minute service, decreasing wait times for nearby residents and employees.
- 4) *Impacts of the subprime mortgage lending crisis and increased foreclosures*: The City secured \$705,151 in state NSP-1 program income during the 2017/18 PY to purchase and rehabilitation three foreclosed properties located at 2516 Gould Avenue, 915 Newtown and 3024 Timothy Street. HfH, the developer, will qualify two homebuyers earning \leq 50% AMI and one \leq 120%.
- 5) *Predatory lending and other industry practices*: The City funded the Credit Report Counseling Services for Low-Income Community Members Program with intention of exploring lending practices through the expertise and networking capacity of Consumer Credit Counseling. CDBG funds were allocated to run credit reports for LMI individuals working through barriers to obtaining employment and securing housing and transportation. One-hundred twenty-four (124) Medford residents were served with these funds including 51 female heads of household, 21 seniors, and one homeless individual. Fifty-one (51) of those served were \leq 30% AMI.

- 6) *Barriers to fair housing impacts on special need populations:* The City maintained annual sponsorship of Southern Oregon Regional Economic Development, Inc. (SORED). The City's sponsorship assisted SORED in inviting and educating prospective companies that have expressed interest in relocation or expansion opportunities in the Medford area. Their contribution to the community included distributing five business loans, creating 675 jobs with direct SORED assistance and conducting outreach to over 150 existing businesses. Their estimated wage impact during the calendar year exceeded 26 million dollars.
- 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. Of the 12 households served, 4 were elderly.

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 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. All records are maintained for a minimum of five years.

During the 2017 PY, onsite monitoring visits were conducted with Medford Senior Center, HAJC and Consumer Credit Counseling. All three projects will carry forward into the 2018 PY. 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. No major findings were identified during the monitoring process. City staff has continued to encourage subrecipients to publicly identify and acknowledge the City of Medford and CDBG as a funding source and will be working with the Senior Center to develop a procurement policy.

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 Housing and Community Development Commission (HCDC) holds meetings monthly and as deemed necessary will 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.

Citizen participation pertaining to the 2017/18 CAPER was facilitated through a 15-day public comment period and two public meetings. The 15-day public comment period opened on October 3, 2018, extended on October 11, 2018, and concluded on November 1, 2018. The HCDC held a meeting on October 17, 2018 to solicit additional public input. CDBG staff presented the CAPER during this meeting, and the HCDC passed a motion approving the CAPER as presented prior to the City Council public hearing held at Medford City Hall, Council Chambers, on Thursday, November 1, 2018, at 6:00 p.m. City Council approved Resolution 2018-123 adopting the 2017/18 CAPER for submission to HUD. No public comments were offered or recorded during the public hearing, HCDC meeting or 15-day public comment period.

The following Council actions relate to the 2017/18 Action Plan:

On June 1, 2017, Council approved Resolution No. 2017-54 adopting the 2017/18 Action and a Substantial Amendment to the 2016/17 Action Plan to allocate any surplus funds to the Medford Senior Center Facility Improvement project.

On June 15, 2017, Council approved Resolution No. 2017-57 adopting the budget for the City of Medford for the biennium commencing July 1, 2017.

On May 3, 2018, Council approved Resolution No. 2018-40 adopting Substantial Amendment No. 1 to the 2017/18 Action Plan to allocate funds to Rogue Valley Youth for Christ for rehabilitation of Fire Station #2 to be used as a youth community center.

On June 21, 2018, Council approved Resolution 2018-65 adopting Substantial Amendment No. 2 to the 2017/18 Action Plan to expand Habitat for Humanity's scope of 1026 W 10th Street from acquisition for rehabilitation of one unit to new construction of three units.

On September 20, 2018, Council approved Resolution 2018-112 adopting a fourth Supplemental Budget for the 2017-19 biennium.

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 2017/18 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 five have not been implemented during the first three years but may be targeted in the final two:

- Provide financial assistance to help potential low/moderate-income homeowners with down payment and closing costs;
- Support the creation of higher density, mixed-income and mixed-use housing in the redevelopment of the downtown area;
- Support programs that assist low/moderate-income residents to become self-sustaining through job skills training, workforce readiness programs and transportation services;
- 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 incubators; and
- Support public services agencies that assist low/moderate-income and special needs populations with safety net services to overcome barriers including mental illness, substance abuse, and physical and mental disabilities.

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	DATE: 10-17-18
	U.S. Department of Housing and Urban Development	TIME: 16:56
	Integrated Disbursement and Information System	PAGE: 1
	PR26 - CDBG Financial Summary Report Program Year 2017 MEDFORD , OR	

PART I: SUMMARY OF CDBG RESOURCES

01 UNEXPENDED CDBG FUNDS AT END OF PREVIOUS PROGRAM YEAR	734,645.74
02 ENTITLEMENT GRANT	629,629.00
03 SURPLUS URBAN RENEWAL	0.00
04 SECTION 108 GUARANTEED LOAN FUNDS	0.00
05 CURRENT YEAR PROGRAM INCOME	234,608.71
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)	1,598,883.45

PART II: SUMMARY OF CDBG EXPENDITURES

09 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	670,857.60
10 ADJUSTMENT TO COMPUTE TOTAL AMOUNT SUBJECT TO LOW/MOD BENEFIT	218,269.40
11 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 09 + LINE 10)	889,127.00
12 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	86,912.89
13 DISBURSED IN IDIS FOR SECTION 108 REPAYMENTS	0.00
14 ADJUSTMENT TO COMPUTE TOTAL EXPENDITURES	(200.00)
15 TOTAL EXPENDITURES (SUM, LINES 11-14)	975,839.89
16 UNEXPENDED BALANCE (LINE 08 - LINE 15)	623,043.56

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	48,974.92
19 DISBURSED FOR OTHER LOW/MOD ACTIVITIES	616,026.38
20 ADJUSTMENT TO COMPUTE TOTAL LOW/MOD CREDIT	182,092.64
21 TOTAL LOW/MOD CREDIT (SUM, LINES 17-20)	847,093.94
22 PERCENT LOW/MOD CREDIT (LINE 21/LINE 11)	95.27%

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	60,101.76
28 PS UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	4,337.97
29 PS UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	0.00
30 ADJUSTMENT TO COMPUTE TOTAL PS OBLIGATIONS	26,225.03
31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30)	90,664.76
32 ENTITLEMENT GRANT	629,629.00
33 PRIOR YEAR PROGRAM INCOME	125,277.00
34 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP	0.00
35 TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34)	754,906.00
36 PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35)	12.01%

PART V: PLANNING AND ADMINISTRATION (PA) CAP

37 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	86,912.89
38 PA UNLIQUIDATED OBLIGATIONS AT END OF CURRENT PROGRAM YEAR	11,642.74
39 PA UNLIQUIDATED OBLIGATIONS AT END OF PREVIOUS PROGRAM YEAR	0.00
40 ADJUSTMENT TO COMPUTE TOTAL PA OBLIGATIONS	26,790.12
41 TOTAL PA OBLIGATIONS (LINE 37 + LINE 38 - LINE 39 +LINE 40)	125,345.75
42 ENTITLEMENT GRANT	629,629.00
43 CURRENT YEAR PROGRAM INCOME	234,608.71
44 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PA CAP	0.00
45 TOTAL SUBJECT TO PA CAP (SUM, LINES 42-44)	864,237.71
46 PERCENT FUNDS OBLIGATED FOR PA ACTIVITIES (LINE 41/LINE 45)	14.50%

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

Plan Year	IDIS Project	IDIS Activity	Activity Name	Matrix Code	National Objective	Drawn Amount
2016	2	389	Newbridge Place	03K	LMH	\$9,471.60
Total				03K	Matrix Code	\$9,471.60

Plan Year	IDIS Project	IDIS Activity	Activity Name	Matrix Code	National Objective	Drawn Amount
2016	2	389	Newbridge Place	03K	LMH	\$10,502.00
Total				03K	Matrix Code	\$10,502.00

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
2016	3	390	6084651	Affordable Housing Property Acquisition	01	LMH	\$96,251.00
					01	Matrix Code	\$96,251.00
2017	3	408	6147662	Medford Senior Center Facility Improvement	03A	LMC	\$9,883.70
					03A	Matrix Code	\$9,883.70
2017	5	396	6147662	Union Park ADA Upgrade Project	03F	LMA	\$6,386.45
2017	6	395	6147662	Jackson Park ADA Upgrade Project	03F	LMA	\$3,420.00
					03F	Matrix Code	\$9,806.45
2015	17	370	6087004	Neighborhood Infrastructure Improvements Project	03L	LMA	\$3,514.70
2015	17	370	6087005	Neighborhood Infrastructure Improvements Project	03L	LMA	\$16,541.33
2015	17	370	6087409	Neighborhood Infrastructure Improvements Project	03L	LMA	\$200.00
2015	17	370	6147664	Neighborhood Infrastructure Improvements Project	03L	LMA	\$120,868.65
					03L	Matrix Code	\$141,124.68
2017	7	406	6147662	Porch Rehabilitation	03Q	LMC	\$2,500.00
					03Q	Matrix Code	\$2,500.00
2017	10	398	6147662	Community Volunteer Network Foster Grandparent Program	05A	LMC	\$10,172.35
					05A	Matrix Code	\$10,172.35
2017	12	397	6147662	Furthering Fair Housing - Legal Services	05C	LMC	\$9,042.00
					05C	Matrix Code	\$9,042.00
2017	13	400	6147662	Wrap Around Case Managment Program	05D	LMC	\$23,455.00
2017	15	404	6147662	Healthy Families, Healthy Communities	05D	LMC	\$8,975.50
					05D	Matrix Code	\$32,430.50
2016	4	383	6087004	Reducing Medford Homelessness in 2016	05Q	LMC	\$1,809.26
2017	14	401	6147662	Reducing Medford Homelessness in 2017	05Q	LMC	\$5,730.00
					05Q	Matrix Code	\$7,539.26
2017	8	402	6147662	Credit Counseling Services for Low-Income Community Members Program	05Z	LMC	\$917.65
					05Z	Matrix Code	\$917.65
2015	21	393	6147662	PeopleFirst Properties Rental Rehab Project	14A	LMH	\$196.00
2016	1	388	6087006	Homeowner Repair Program	14A	LMH	\$141,488.90
2016	1	388	6097502	Homeowner Repair Program	14A	LMH	\$80,350.61
2016	1	388	6147662	Homeowner Repair Program	14A	LMH	\$73,749.11
					14A	Matrix Code	\$295,784.62
2015	20	392	6087387	City of Medford Code Enforcement of Blighted Properties	15	LMA	\$574.17
					15	Matrix Code	\$574.17
Total							\$616,026.38

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2017	3	408	6196357	Medford Senior Center Facility Improvement	03A	LMC	\$3,870.57
					03A	Matrix Code	\$3,870.57
2017	5	396	6196357	Union Park ADA Upgrade Project	03F	LMA	\$2,113.55
2017	6	395	6196357	Jackson Park ADA Upgrade Project	03F	LMA	\$29,080.00
					03F	Matrix Code	\$31,193.55
2015	17	370	6196357	Neighborhood Infrastructure Improvements Project	03L	LMA	\$15,774.42
					03L	Matrix Code	\$15,774.42
2017	12	397	6196357	Furthering Fair Housing - Legal Services	05C	LMC	\$4,521.00
					05C	Matrix Code	\$4,521.00
2017	15	404	6196357	Healthy Families, Healthy Communities	05D	LMC	\$8,975.50
					05D	Matrix Code	\$8,975.50
2017	14	401	6196357	Reducing Medford Homelessness in 2017	05Q	LMC	\$15,173.41
					05Q	Matrix Code	\$15,173.41
2017	8	402	6196357	Credit Counseling Services for Low-Income Community Members Program	05Z	LMC	\$3,702.74
					05Z	Matrix Code	\$3,702.74
2015	21	393	6196357	PeopleFirst Properties Rental Rehab Project	14A	LMH	\$24,804.00
2017	9	405	6196357	Homeowner Repair	14A	LMH	\$180,262.19
					14A	Matrix Code	\$205,066.19
2017	2	407	6196357	Royal Apartments Infrastructure Improvement Project	14C	LMH	\$48,974.92
					14C	Matrix Code	\$48,974.92
2015	20	392	6196358	City of Medford Code Enforcement of Blighted Properties	15	LMA	\$800.00
					15	Matrix Code	\$800.00
Total							\$338,052.30

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
2017	10	398	6147662	Community Volunteer Network Foster Grandparent Program	05A	LMC	\$10,172.35
					05A	Matrix Code	\$10,172.35
2017	12	397	6147662	Furthering Fair Housing - Legal Services	05C	LMC	\$9,042.00
					05C	Matrix Code	\$9,042.00
2017	13	400	6147662	Wrap Around Case Managment Program	05D	LMC	\$23,455.00
2017	15	404	6147662	Healthy Families, Healthy Communities	05D	LMC	\$8,975.50
					05D	Matrix Code	\$32,430.50
2016	4	383	6087004	Reducing Medford Homelessness in 2016	05Q	LMC	\$1,809.26
2017	14	401	6147662	Reducing Medford Homelessness in 2017	05Q	LMC	\$5,730.00
					05Q	Matrix Code	\$7,539.26
2017	8	402	6147662	Credit Counseling Services for Low-Income Community Members Program	05Z	LMC	\$917.65
					05Z	Matrix Code	\$917.65
Total							\$60,101.76

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2017	12	397	6196357	Furthering Fair Housing - Legal Services	05C	LMC	\$4,521.00
					05C	Matrix Code	\$4,521.00
2017	15	404	6196357	Healthy Families, Healthy Communities	05D	LMC	\$8,975.50
					05D	Matrix Code	\$8,975.50
2017	14	401	6196357	Reducing Medford Homelessness in 2017	05Q	LMC	\$15,173.41
					05Q	Matrix Code	\$15,173.41
2017	8	402	6196357	Credit Counseling Services for Low-Income Community Members Program	05Z	LMC	\$3,702.74
					05Z	Matrix Code	\$3,702.74
Total							\$32,372.65

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	6087004	Program Administration	21A		\$5,491.30
2016	10	382	6087005	Program Administration	21A		\$14,432.42
2016	10	382	6087006	Program Administration	21A		\$796.66
2017	17	410	6147662	Program Administration	21A		\$66,192.51
					21A	Matrix Code	\$86,912.89
Total							\$86,912.89

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2017	17	410	6196357	Program Administration	21A		\$59,153.24
					21A	Matrix Code	\$59,153.24
Total							\$59,153.24