

**City of Medford
Community Development Block Grant
(CDBG) Program**



MEDFORD
OREGON

**2021/22 Consolidated
Annual Performance
Evaluation Report (CAPER)**

July 1, 2021 through June 30, 2022

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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 2021/22 program year (PY), referred to hereafter as the 2021 PY, marked the second year of the City of Medford's 2020-24 Consolidated Plan. Throughout the year, the City focused primarily on strategies to increase services and emergency shelter options for individuals experiencing homelessness, reduce barriers to the development of affordable housing, improve housing stability for households at risk of becoming homeless, and increase overall sustainable community capacity to address homelessness, including during the Coronavirus pandemic and aftermath of the Almeda Fire. A summary of recent history, initiatives, and highlights proposed and executed throughout the program year include the following:

- Through previously securing \$2.55 million in Project Turnkey funding from the Oregon Community Foundation to acquire the Redwood Inn Motel to convert to non-congregate shelter/temporary housing to support Almeda Fire victims and homeless individuals, staff worked with Rogue Retreat (as the primary operator and owner) to assist with developing sustainability of operations. The City also previously secured \$120,000 in Providence funding to dedicate four units to recuperative care with another five units dedicated to Jackson County Health to support COVID patients. Throughout the year, the City worked with Rogue Retreat to develop solutions to delayed construction due to labor shortages and a funding gap.
- Through previously securing \$2.5 million for the development of a navigation center, a 24/7 low-barrier emergency shelter with wraparound services, from the State of Oregon Legislature under HB 2004 for funding and HB 2006 for policy, City staff worked closely with partners including Rogue Retreat, ACCESS, the Continuum of Care, Jackson County Mental Health, Center for Nonprofit Legal Services, Department of Human Services, La Clinica and many more to develop a coordinated service delivery model that will be implemented in FY 2022.
- Consulting with the expertise from the Community Services and Development Commission (CSDC), charged with representing as the advisory body to Medford City Council on matters related to homelessness, which includes two seats for those with lived experience regarding matters of homelessness, and
- Continued supporting operations of the Urban Campground (following the Center for Disease Control guidelines, incorporating proper social distancing measures) in partnership with Rogue Retreat, the Medford Police Department/Livability Team, and several other community partners,

- Continued supporting the Medford Severe Weather Shelter pilot program to assist with shelter resources when severe weather events are declared by the City through assistance from the following community partners: ACCESS, Addictions Recovery Center, the Continuum of Care, Jackson County Health and Human Services, Medford Gospel Mission, Medford Senior Center, Rogue Retreat, and St. Vincent de Paul.
- Finished the development of the 6-Step Toolkit for the Development of Affordable Housing through consulting with Luken Solutions and an ad hoc team created with Housing Advisory Commission (HAC) commissioners, Housing Pipeline members, and CSDC commissioners to assist with helping garner community support for affordable housing projects.
- The City consulted with Kaleidoscope Consulting to complete the City's Diversity, Equity, and Inclusion Assessment in June 2022, which includes 32 recommended actions for consideration and was supported by CDBG.
- The City was awarded \$1 million from Oregon Housing & Community Services (OHCS) for the acquisition of a vacant lot behind the Navigation Center to expand the campus including adding: additional parking for partners, a community garden, and an outdoor space for residents and pets.
- OHCS also awarded the City of Medford \$536,000 for behavioral health staffing through partner agencies to support the behavioral health component of the Navigation Center

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 provides comparisons of expected versus actual outcomes accomplished during the 2021 PY— please see Table 1 for descriptions of objectives referenced in this section.

Table 1 – Accomplishments – 2021/22 Program Year

Goal	Description	Indicator	Expected Outcome	Actual Outcome	Unit of Measure	Percent Complete
1	Affordable Housing Provide expanded housing options for all economic and demographic segments of Medford's population, focusing on housing affordable to households with income at or below 80% of HAMFI, while diversifying the housing stock across the city.	Homeowner Housing Rehabilitated <ul style="list-style-type: none"> - Housing Authority of Jackson County - Homeowner Repair Program 2020 (11) - Rebuilding Together Rogue Valley - Accessible Ramps for Medford Elders & Persons With Disabilities 2021 (0) - Rebuilding Together Rogue Valley - Accessible Ramps for Medford Elders & Persons With Disabilities 2020 (0) 	10	11	Housing Units	110.00%
		Housing for Homeless Added <ul style="list-style-type: none"> - *ColumbiaCare - Veterans Housing 2020 (0) <p>*Not listed in IDIS table</p>	0	0	Households	N/A*
		Rental Units Rehabilitated <ul style="list-style-type: none"> - OnTrack Rogue Valley - Oakdale Apartment Repairs 2021 (0) - Rebuilding Together Rogue Valley 2021 (0) - Rebuilding Together Rogue Valley 2020 (0) - OnTrack Rogue Valley - Strengthening the Foundations (Hamilton Property) 2020 (2) 	5	2	Housing Units	40%

Goal	Description	Indicator	Expected Outcome	Actual Outcome	Unit of Measure	Percent Complete
		Homeowner Housing Added <ul style="list-style-type: none"> - *Habitat for Humanity - 1026 W 10th Street 2017 (1) <p>*Not listed in IDIS table</p>	0	1	Housing Units	N/A*
2	Support and Strengthen Homeless Services and Housing <p>Expand access to housing and supportive services that address homelessness in Medford through collaborative action with the City's partners. Implement the goals and actions identified in the Homeless System Action Plan (HSAP).</p>	Homeless Person Overnight Shelter <ul style="list-style-type: none"> - ACCESS - Medford Severe Weather Shelter Operations 2021 (75) - City of Medford through Rogue Retreat - 421 W 10th St Lease PSP 2020 (8) - Hearts With A Mission - Medford Youth Shelter PSP 2021 (82) - Hearts With A Mission - Transitional Living Program Home Rehabilitation CIP 2021 (0) - OnTrack - Renovation of 421 W 10th St 2020 & 2021 (0) - Rogue Retreat - Year-Round Shelter Service 2021 (236) <p><u>CDBG-CV</u></p> <ul style="list-style-type: none"> - *City of Medford for Rogue Retreat – Urban Campground Lease 2019 (769) - *Rogue Retreat – Project Turnkey 2019 (79) <p>*Not listed in IDIS table</p>	870	1,249	Persons Assisted	143.56%

Goal	Description	Indicator	Expected Outcome	Actual Outcome	Unit of Measure	Percent Complete
	<p>Public Service Activities other than LMI Housing Benefit:</p> <ul style="list-style-type: none"> - Maslow Project - Navigation/ Resource One-Stop Center 2021 (1,334) <p><u>CDBG-CV</u></p> <ul style="list-style-type: none"> - *ACCESS – Homeless Outreach Specialist 2019 (36) - *La Clinica - Urban Campground Mobile Medical Clinic 2019 (478) <p>*Not listed in IDIS table</p>		800	1,848	Persons Assisted	228.50%
	<p>Overnight/Emergency Shelter/Transitional Housing Beds Added:</p> <ul style="list-style-type: none"> - *Youth 71Five Ministries - Acquisition of Real Property 2017 (26) <p>*Not listed in IDIS table</p>		0	26/7	Persons Assisted/Beds Added	N/A

Goal	Description	Indicator	Expected Outcome	Actual Outcome	Unit of Measure	Percent Complete
3	<p>Increase Opportunities for Low- to Moderate-Income and Special Needs Residents to Become Self-Sustaining</p> <p>Support residents to become self-sustaining by increasing the availability and accessibility of essential support services to residents who are low- to moderate-income, residents with special needs, families with children, people living with disabilities, seniors, youth, and people living with mental health and substance use disorders.</p>	<p>Public Service Activities other than LMI Housing Benefit:</p> <ul style="list-style-type: none"> - Youth 71 Five Ministries - Vocational Training 2021 (33) <p><u>CDBG-CV</u></p> <ul style="list-style-type: none"> - *Center for NonProfit Legal Services - Legal Services Related to COVID-19 2019 (184) <p>*Not listed in IDIS table</p>	70	217	Persons Assisted	310%
		<p>Homelessness Prevention</p> <p><u>CDBG-CV:</u></p> <ul style="list-style-type: none"> - *Community Works – Emergency Rent Payments 2019 (24) <p>*Not listed in IDIS table</p>	0	318	Persons Assisted	N/A

Goal	Description	Indicator	Expected Outcome	Actual Outcome	Unit of Measure	Percent Complete
4	<p>Improve Quality of Life through Neighborhood Revitalization Improve quality of life through neighborhood revitalization and improvements of community infrastructure and facilities. Engage the community in discussions about ways to improve Medford's public facilities and revitalize neighborhoods. Proactively plan for infrastructure needs by providing facilities necessary for the City's residents and visitors in a manner that is financially and environmentally sustainable.</p>	<p>Public Facility or Infrastructure Activities other than LMI Housing Benefit:</p> <ul style="list-style-type: none"> - City of Medford Public Works - ADA Audible Push Button Traffic Signals 2020 (0) - *Compass House – Property Renovation Phase II 2019 (0) <p>*Not listed in IDIS table</p>	0	0	Persons Assisted	0%

Goal	Description	Indicator	Expected Outcome	Actual Outcome	Unit of Measure	Percent Complete
5	<p>Support and Promote Community and Economic Development Efforts that Support Economic Stability</p> <p>Pursue community and economic development efforts that support or improve housing development, economic mobility, small business ownership, economic stability, and the community's economic vitality.</p>	<p>Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit:</p> <ul style="list-style-type: none"> - Youth 71Five Ministries – VoTech Expansion 2021 (0) 	40	0	Persons Assisted	0%

Table 2 – Strategic Plan to Date (2020-24 Consolidated Plan)

Goal	Description	5-Year Funding	Indicator	Expected Outcome	Actual Outcome	Unit of Measure	Percent Complete
1	Affordable Housing	\$2,280,099	Homeowner Housing Rehabilitated	110	21	Housing Units	19.09%
			Rental Housing Rehabilitated	45	2	Housing Units	4.44%
			Housing for Homeless Added	30	0	Housing Units	0%
			Homeowner Housing Added *Not listed in ConPlan	N/A	3	Housing Units	N/A *Not listed in ConPlan
2	Homeless Services & Housing	\$277,500	Homeless Person Overnight Shelter	1,440	1,632	Persons	113.33%
			Overnight/Emergency Shelter/Transitional Housing Beds Added *Not listed in ConPlan	N/A	7/26	Beds/Persons Assisted	N/A *Not listed in ConPlan
			Public Service Activities other than Low/Moderate Income Housing Benefit *Not listed in ConPlan	N/A	1,921	Persons	N/A *Not listed in ConPlan
			Public Facility or Infrastructure Activities other than Low-/Moderate-Income Housing Benefit *Not listed in ConPlan	0	20	Persons	N/A *Not listed in ConPlan
3	Public Services	\$272,500	Public Service Activities other than LMI Housing Benefit	775	395	Persons	50.97%
	Neighborhood Revitalization	\$710,000	Homelessness Prevention	375	342	Persons	91.20%
4			Public Facility/Infrastructure other than LMI Housing Benefit	1,900	3,940	Persons	207%
5	Community & Economic Development	\$125,000	Businesses Assisted	475	0	Businesses	0%

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 five goals. The goals and accomplishments made during the 2020 PY are referenced below:

Goal 1) Expand and Improve Affordable Housing Options

Under the 2020-24 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 2021 PY included no-interest loans for housing rehabilitation for homeowners, housing rehabilitation for those recovering from addiction, increasing accessibility through modular ramps for persons of disabilities, and development of affordable homeowner housing.

Homeowner Housing Rehabilitated: The City, through its Homeowner Repair Program administered by the Housing Authority of Jackson County (HAJC), expended \$243,263.15 in PY 21 entitlement funds to provide zero-interest, deferred loans to 11 LMI homeowners in need of rehabilitation to correct hazards and conditions affecting health and affordability. One home was improved to meet an Energy Star rating, eight were brought from substandard to standard condition, six homeowners were senior citizens, and one home was made accessible. Activities included repairing roofs; failing heating, plumbing, and sewage 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.

City staff is working closely with Rebuilding Together Rogue Valley (RBTRV), following prior staff turnover, to implement a work plan to help increase accessibility and safety for income eligible households with persons of disabilities through the implementation of modular ramps.

Homeowner Housing Added: Habitat for Humanity (HfH) achieved anticipated performance outcomes from 1026 W 10th Street, which previously expended \$98,051 in 2017 CDBG funds. Two out of three homebuyers successfully purchased affordable townhomes in the prior PY. A third homebuyer was located, as initial homebuyer unfortunately experienced significant challenges with securing and maintaining employment, due to complications stemming from the COVID-19 pandemic. Performance outcomes have been successfully achieved, as the third homebuyer (a veteran, female head of household) closed on June 30, 2022.

Rental Units Rehabilitated

OnTrack's Strengthening the Foundations (Hamilton Property) 2020 project successfully completed with roof replacement for two affordable housing units, serving two households recovering from addition.

OnTrack's Oakdale Apartments Repairs project is anticipated to be completed in the next PY, serving households recovering from addiction.

Goal 2) Support and Strengthen Homeless Services and Housing

City Council continues to support and strengthen homeless services and housing through prioritizing addressing homelessness, utilizing the City's Homeless System Action Plan (HSAP) as a driving force to identify key goals and actions to help assist with reducing homelessness in the community.

Homeless Person Overnight Shelter:

ACCESS' Medford Severe Weather Shelter Operations utilized \$1,642 in funding to support emergency shelter operations for one City-declared severe weather event, serving 75 individuals experiencing homelessness from severe weather.

The City supported Hearts with a Mission (HWAM), Medford's only permanent youth emergency homeless shelter, with \$22,486 to support operations, serving 82 unduplicated homeless youth; the General Fund Grant, a local funding source, also provided leverage of \$18,750.

The City is also supporting HWAM through transitional housing rehabilitation, anticipated to complete in the next PY.

Rogue Retreat's Kelly Shelter program, the only year-round emergency shelter in Jackson County, utilized \$25,000 in CDBG funding to serve 236 individuals experiencing homelessness with emergency shelter and services; the General Fund Grant, a local funding source, also provided leverage of \$50,000.

Rogue Retreat through the City of Medford supported the lease of 421 W 10th Street with \$14,000 to serve eight individuals experiencing homelessness with transitional housing for the Chronically Homeless Outreach Partnership, a partnership between Rogue Retreat, OnTrack, and the Medford Livability Team.

Rogue Retreat's Project Turnkey utilized \$83,529.64 in CDBG-CV funding to serve 79 individuals experiencing homelessness (including those following hospital discharge) and wildfire victims with transitional housing.

The City supported the Urban Campground with Rogue Retreat through lease payments via \$49,800, serving 769 individuals experiencing homelessness with emergency shelter.

Public Service Activities other than LMI Housing Benefit:

ACCESS' Homeless Outreach served 36 individuals experiencing homelessness, utilizing \$29,959.66 in CDBG-CV funding.

La Clinica's Mobile Medical Clinic utilized \$49,800 to serve 478 individuals experiencing homelessness at the Kelly Shelter and the Urban Campground.

Maslow Project served 1,334 homeless, and at risk of experiencing homelessness, youth and families with services and outreach; the General Fund Grant, a local funding source, also provided leverage of \$15,000.

14 - Overnight/Emergency Shelter/Transitional Housing Beds added:

The City supported Youth 71Five through the prior acquisition of 11 Almond Street with 2017 CDBG funding, which was converted to a dormitory-style transitional housing complex and vocational training facility for homeless youth. The project added 7 beds for transitional housing for homeless youth in the vocational training program, as well as a facility for vocational training, serving 26 individuals thus far.

Goal 3) Increase Opportunities for Low- to Moderate-Income and Special Needs Residents to Become Self-Sustaining

As in past program years, City Council granted the HUD allowable CDBG public service allocation for 2021 of \$113,128 to five nonprofits addressing priority needs particularly homeless services; emergency shelter services; and vocational training for homeless individuals. Public service activities were supported through ACCESS (under Goal 2), Hearts With A Mission (under Goal 2), Maslow Project (served under Goal 2), Rogue Retreat (served under Goal 2), and Youth 71Five Ministries, collectively serving 1,760 individuals with public services aimed at increasing self-sufficiency.

Homelessness Prevention

Through CDBG CARES Act funding, Community Works provided rental assistance to LMI households and domestic violence survivors, serving 24 individuals.

Public Service Activities other than LMI Housing Benefit:

The City supported Center for NonProfit Legal Services (CNPLS) with \$94,000 in CDBG-CV funding and Youth 71 Five Ministries with \$24,000, benefitting 184 LMI individuals with legal services and 33 homeless youth with vocational trade education.

Goal 4) Improve Quality of Life through Neighborhood Revitalization

Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit

The City's ADA Audible Push Button Traffic Signals project has been completed for one location; the second location will be installed in the upcoming PY, increasing accessibility and safety for individuals with disabilities.

The City is working closely with Compass House to complete the phase II property renovation with anticipated performance in the upcoming program year.

Goal 5) Promote Community and Economic Development Efforts that Support Economic Stability

Public Facility or Infrastructure Activities other than LMI Housing Benefit:

Youth 71 Five Ministries is working towards the acquisition to expand the vocational training program. Progress will be reported in the next PY.

Graph 1 - Accomplishments 2021/22 Program Year



*Explanations for Reporting Adjustments

Due to the timing of the current 2020-2024 Consolidated Plan with the allocation of CDBG-CV funding to the 2019 Action Plan (as suggested by HUD) and the completion of multiple activities from years prior to 2021, the City had to adjust data to report accomplishments of 2019 CDBG-CV activities and CDBG activities from years prior to 2021 that expended funding and achieved performance in PY 2021; the above graph shows anticipated and actual performance outcomes from all open CDBG activities, including those funded in prior years. The following sections have been adjusted to account for this: [CR-05](#), [CR-10](#), and [CR-20](#).

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	2,674
Black or African American	104
Asian	24
American Indian or American Native	106
Native Hawaiian or Other Pacific Islander	58
Total	2,966
Hispanic/Latino	802
Not Hispanic/Latino	2,164

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 2,966 people were served under the categories listed in Table 3. Among all single race beneficiaries, 27.03% were Hispanic/Latino; and 72.96%, not Hispanic/Latino.

Additional races not listed in the IDIS-generated table include: twelve American Indian or Alaskan Native and White; one Asian and White; four Black or African American and White; eleven American Indian/Alaskan Native and Black/African American; and 384 Other Multi-Racial. Among the combined persons/families, 33.01% 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: \$1,990,002.29	CDBG: \$937,291.71	CDBG: \$1,052,710.58
<u>CDBG-CV:</u> 958,225.00	<u>CDBG-CV:</u> \$538,013.79	<u>CDBG-CV:</u> \$420,211.21
\$2,948,227.29	\$1,475,305.50	\$1,472,921.79

*As directed by HUD's IDIS system, the CDBG-CV amounts above are cumulative, reflecting PY 2020 and 2021.

Narrative

Resources made available and amounts expended during the 2021 PY were calculated through the IDIS reporting system. Amounts were verified during a review of 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 18: Activity 451, matrix code 14B, was not reported under Line 18. This activity is rehabilitation of low/mod multi-unit housing not carried out by a CDFI and not located in a NRSA. The amount of this adjustment is \$20,561.80.

Line 20: The amount disbursed for other low/mod activities was increased by a total of \$319,052.20 to reflect an accurate 100% low/mod credit. This adjustment includes two figures: 1) \$315,184.13 to include Activity 448 in the calculation to reflect the credit (this activity is reporting under Line 18 but not included in the system's calculation) and 2) \$3,868.02 to account for Activity 474, LMH/14A (this project is not located in an NRSA nor carried out by a CDFI). All activities during the 2021 program year that were subject to low/mod benefit served low/mod persons, resulting in a 100% credit.

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.

Please include if any publicly owned land or property located in the city was used to address Action Plan needs.

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 2021 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 \$ \$1,042,554. These projects provided a combined expended leverage of \$4,754,835. Of the combined leverage, leverage for the Hearts With A Mission's emergency homeless youth shelter and services composed of \$2,412,908. Among the leverage sources, state or local accounted for 41.79%; other federal funds, 24.30%, foundations, 16.26%, private contributions, 14.42%, and program fees/dues, 3.22%.

In addition, the City leases at no cost, City-owned land to sustain Hope Village, Southern Oregon's first tiny house community through Rogue Retreat, providing transitional supportive housing for individuals experiencing homeless, located on City of Medford owned property, adjacent to Medford City Operations Facilities at the corner of North Columbus and West McAndrews Road.

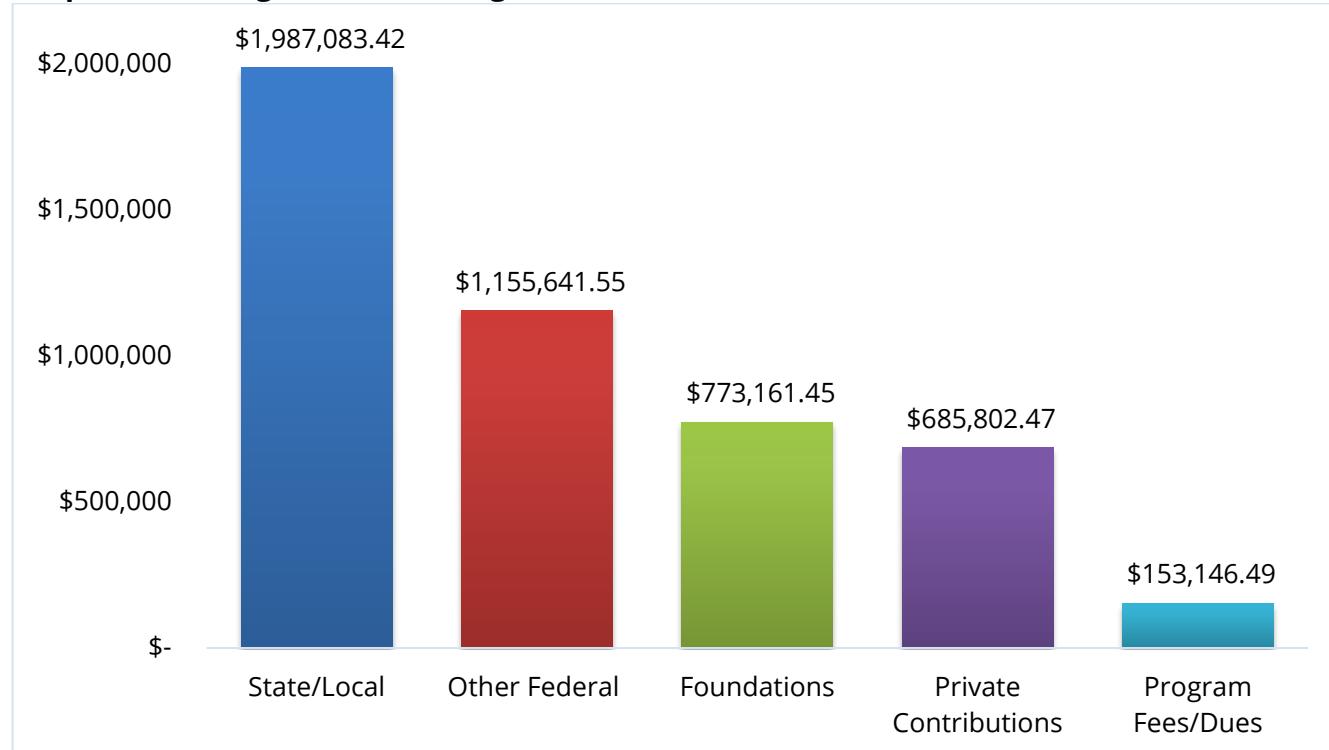
Through a recent amendment to the 2019 Action Plan, the City is also supporting the Urban Campground, a COVID-19 temporary homeless campground (following the Center for Disease Control guidelines, incorporating proper social distancing measures), by utilizing \$26,000 in CDBG-CV funding to secure a property lease to continue operations while the City and Rogue Retreat explore options and funding for a permanent location. Funding was expended by June 30, 2022. The Urban Campground is in partnership with Rogue Retreat, the Medford Police Department/Livability Team, and several other community partners.

To support individuals experiencing homelessness, City Council approved an operations and real property use agreement with Rogue Retreat for the operations of the Navigation Center on Market Street. In addition, City Council also approved an ordinance ratifying a purchase agreement for a 3.69 acre site to be used as the new location for the Urban Campground and approved leveraging \$1 million of American Rescue Plan Act (ARPA) funds for the acquisition of this site.

In the 2021/22 program year, \$265,000 dollars in total General Fund Grant (GFG) leverage was provided to support 13 programs. Within these programs, 46,918 persons received services. Of

those served, 75% of all persons receiving benefits were categorized as extremely low income (30% AMI or below.)

Graph 2 – Leverage – 2021/22 Program Year



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

Number of households/persons to be supported	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	0	12
Number of Special-Needs households to be provided affordable housing units	15	26
Total	15	38

Table 7 – Households Provided Affordable Housing Support

Number of households/persons to be supported	One-Year Goal	Actual
Number of households supported through rental assistance	0	24
Number of households supported through the production of new units	0	1
Number of households supported through rehab of existing units	15	13
Number of households supported through acquisition of existing units	0	0
Total	15	38

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 2020 ColumbiaCare acquisition project to convert to Permanent Supportive Housing (PSH) to serve homeless veterans experienced delays during the 2021 PY, due to individuals experiencing homelessness from the CHOP partnership with Rogue Retreat temporarily residing at this home. Rogue Retreat was able to move all residents to the Redwood Inn/Project Turnkey and ColumbiaCare is completing required repairs per a VA inspection, prior to moving in veterans experiencing homelessness, which will be completed in the next PY. CHOP residents were able to move from co-housing at 1316 W Main to small apartment-style rooms at Project Turnkey, which was an upgrade for these residents.

Number of Non-Homeless Households to be Provided Affordable Housing Units:

HfH acquired the existing unit at 1026 W 10th Street in July 2019 and converted the property into three new homebuyer units in May 2019. Project is complete, following the closing of the third homebuyer (an Almeda Fire survivor, veteran, and female head of household) in June 2022, after delays associated with COVID-19.

Number of Special-Needs Households to be Provided Affordable Housing Units:

OnTrack Rogue Valley's Oakdale Apartment Repairs (2021) has been delayed due to construction shortage, environmental review delays, and staff administrative capacity. Project will be completed in the next PY.

However OnTrack's Hamilton project (2020) for roof replacement successfully completed, assisting two households (versus four) recovering from addiction with safe and affordable housing; project fell short of performance outcomes due to a misestimation.

City staff plans on working closely in the next PY with Rebuilding Together Rogue Valley's 2020 and 2021 projects to implement a work plan, due to staff turnover, environmental review delays, construction delays, and City staff capacity, coupled with challenges encountered from COVID-19, in order to increase accessibility via modular ramps in housing for individuals with disabilities.

The 2019 CDBG-CV/CARES Act emergency rental assistance program for Community Works served 24 domestic violence survivors, completing full expenditure.

Number of Houses Supported through Rental Assistance:

Rental assistance performance through funding provided by the CDBG-CV/CARES Act exceeded expectations, serving 24 domestic violence survivors this PY, 27 last PY, vs. 13 anticipated. The variance is attributed to a misestimation.

Number of houses supported through production of new units:

HfH's 1026 W 10th Street project completed and achieved performance outcomes with the successful home purchase for the third homebuyer.

Number of Households Supported through Rehab of Existing Units:

The HAJC served 11 households via the 2020 Homeowner Repair Program (HRP), which fell slightly short of performance goals of 18 due to contractor/workforce and supply shortage caused by the COVID-19 pandemic due to increased overall construction costs.

OnTrack Rogue Valley's 2020 Hamilton project to serve households recovering from addiction with affordable housing completed, serving two households, which fell short of performance outcomes due to a misestimation.

Due to delays from COVID-19, including rising construction costs, construction/labor shortage, environmental reviews, project delays, and City staff capacity, OnTrack's 2021 Oakdale Apartments rehabilitation project and RBTRV's 2020 and 2021 to increase accessibilities through modular

ramps have not yet completed. Staff will work closely to assist with project completion during the upcoming PY.

Number of households supported through acquisition of existing units

Discussed above, the 2020 ColumbiaCare acquisition project to convert to PSH to serve homeless veterans will complete in the next PY.

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 pandemic and Almeda Fire, the division is continuing to consult with Camas Consulting for assistance regarding the environmental review process. Staff capacity is also expected to increase in the next PY as a Housing Project Coordinator started in May 2022 to assist with strengthening administrative capacity within the HCD. City staff continues to brainstorm solutions to better systems and delegation for more efficient performance estimation and overall project management, including the research and future implementation of grant management software to further assist with building administrative capacity.

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	26	n/a
Low-income	4	n/a
Moderate-income	8	n/a
Total	38	n/a

Narrative Information

Please include a summary of the efforts to address “worst case needs”, and progress in meeting the needs of persons with disabilities. Worst-case housing needs are defined as low-income renter households who pay more than half of their income for rent, live in seriously substandard housing, which includes homeless people, or have been involuntarily displaced. The needs of persons with disabilities do not include beds in nursing homes or other service-centered facilities.

Describe other actions taken to foster and maintain affordable housing 91.220(k); 91.520(a).

Agencies contributing to the numbers above include HAJC's Homeowner Repair program for 2020, Community Works, OnTrack's Hamilton project, and HfH's 1026 W 10th Street. As per IDIS, Table 8

demographics apply to households and persons reported under Table 6 and Table 7 that received housing assistance at each income level during the program year.

The City seeks to address and prioritize most vulnerable populations, including persons with disabilities, low-income renter households, and homeless individuals. For instance, as previously experienced during the Alameda Fire in September 2020, accessibility is critical to address in worst case emergency evacuation circumstances for individuals living with disabilities. RBTRV's modular ramps assists with helping save lives by increasing accessibility for individuals living with disabilities to allow for safe and quick evacuation when needed, which the City will assist with to ensure project completion in the upcoming PY.

In addition, rental assistance provided through Community Works assisted survivors of domestic violence to help prevent homelessness during the COVID-19 pandemic and secure sustainability of households with safe, transitional housing.

HAJC's 2020 HRP maintains safe and habitable living conditions for LMI households, and RBTRV increases accessibility for persons with disabilities.

To continue stimulating naturally occurring affordable housing, Council approved a \$150,000 allocation of ARPA funds to continue the Accessory Dwelling Unit (ADU) Systems Development Charge Reduction Program in May 2022. The initial program ran from December 1, 2020 through June 1, 2022, successfully spurring the development of 31 new ADUs on private property in the first 13 months of the program. With a historical average of about 8-10 units per year, the program encouraged above average development. The program's extension provides one additional year of funding by reducing the development cost of ADUs for participating homeowners.

In June 2022, Council approved the allocation of \$682,310 (\$400,000 from Construction Excise Tax and \$282,310 from Council Vision Funds) to fund four new affordable housing projects that will create 272 new residential units. These projects are summarized below:

- Housing Authority of Jackson County: \$400,000 to develop two projects totaling 196 units. Each project will provide 98 units and primarily serve General Family/Workforce individuals and family households earning up to 60% Area Median Income (AMI). The Prescott Gardens project will be located at the 2100 block of Keene Way Drive and the Orchard Meadows project will be located at 1652 and 1634 Orchard Home Drive.
- Providence Medford: \$160,000 for the construction of 69 units of permanent supportive housing for homeless seniors who rely on frequent hospitalizations for health care. Supportive services will be available on-site at 1175 Royal Avenue
- CASA of Oregon: \$122,310 for the construction of 34 housing units for agricultural workers displaced by the 2020 Alameda Fire. The Summit Gardens project, located at 915 Broad Street will dedicate 33 units for households at or below 60% AMI and one for a resident manager.

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 \$113,119.95, or 100%, of allowable CDBG public service allocation to five agencies serving homeless persons. Supporting ACCESS, Hearts with A Mission, Maslow Project, Rogue Retreat, and Youth 71Five Ministries helped the City collectively serve 1,760 individuals.

The City also assisted with supporting lease payments of \$14,000 to support the CHOP, serving eight individuals previously experiencing homelessness with transitional housing.

The City also supported ColumbiaCare's Veterans Housing program through \$315,000 for the acquisition of 1316 W Main Street to serve veterans experiencing homelessness with PSH.

In addition, the City awarded \$40,000 for transitional housing rehabilitation for Hearts With A Mission youth experiencing homelessness and \$270,000 for the expansion of Youth 71Five's vocational training program to support vocational education, helping further career opportunities to homeless youth and young adults.

Using CDBG-CV funding, the City supported ACCESS to provide homeless outreach, the lease of the Urban Campground, rental assistance through Community Works for survivors of domestic violence, medical services for the Kelly Shelter and Urban Campground, and Project Turnkey, for a combined \$196,169.90, serving 1,386 homeless individuals.

Outside of CDBG funding, the City allocated \$190,300 in valuable leverage funding from the City's local General Fund Grant (GFG) program to directly support homeless persons and services, serving 6,445 persons to date. Through all GFG programs, 7,674 individuals experiencing homelessness have been served.

The City awarded \$50,000 from the Council Vision Fund to Rogue Retreat to support reunification efforts for persons and families experiencing homelessness. This program successfully reunited 74 individuals with friends or family using \$29,398.49 of the \$50,000. The remaining funds will be available during FY 22.

The City continues to capitalize on a \$23,375 2018 PY investment in the completion of the Medford Homeless System Action Plan (HSAP), which identifies 32 actions within five goals, including: 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.

This City's Livability Team (LVT), created in September 2019 and referenced in previous CAPER's, continued to improve 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. The City anticipates the CHOP will continue to grow both through partnerships and financial support for years to come.

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

As presented in prior sections, the City supported Hearts With A Mission, Medford's only permanent youth emergency homeless shelter, with \$22,486 to support operations that served 82 unduplicated homeless youth with nights of accommodation and basic needs annually. Program also helped re-unify youth with family or a safe alternative and with progression 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.

Rogue Retreat's Kelly Shelter, the first low-barrier, year-round emergency homeless shelter in Jackson County, the Kelly Shelter provided 236 homeless individuals with emergency shelter and services using \$25,000 in CDBG funding.

The Medford Severe Weather Event Shelter provided 75 individuals experiencing homelessness with emergency shelter during one City-declared severe weather event with \$1,642 in CDBG funding.

The City's support of the 421 W 10th Street lease supported eight individuals experiencing homelessness in partnership with the CHOP (including the Medford Livability Team, OnTrack, and Rogue Retreat) with transitional housing.

In addition, CDBG-CV funding supported the Urban Campground lease, providing emergency shelter for 769 individuals experiencing homelessness. Also, CDBG-CV supported La Clinica's mobile medical clinic to serve 478 individuals experiencing homelessness at the Kelly Shelter and Urban Campground, preventing, preparing and responding to COVID-19. Project Turnkey was also supported, serving 79 individuals experiencing homelessness (including those in need of recuperative care) and Almeda Fire survivors with transitional housing.

The 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 recently funding Providence with \$160,000 to support construction of 69 new units for permanent supportive housing for homeless

seniors who rely on frequent hospitalizations for health care. In addition, Casa of Oregon was also awarded \$122,310 for the construction of 34 housing units for agricultural workers displaced by the 2020 Almeda Fire, with households at or below 60% AMI. 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 GFG funding source awarded \$106,250 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, and Rogue Retreat's Kelly Shelter and Navigation Center, serving 701 individuals (thus far) with emergency shelter, transitional housing, and services.

OHCS awarded the City \$1 million for the acquisition of a vacant lot behind the Navigation Center to support the expansion and creation of: a community garden, outdoor space for residents and pets, and additional parking for partners. Furthermore, OHCS awarded the City \$536,000 for behavioral health staffing through partner agencies to support the behavioral health component of the Navigation Center.

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 \$113,119.65 in CDBG funds, serving 1,760 individuals, targeting LMI individuals and families that were homeless or at risk of experiencing homelessness. Services provided by ACCESS, Hearts With A Mission, Maslow Project, Rogue Retreat, and Youth 71Five Ministries were summarized in the previous sections. 2020 CDBG funding also supported the lease of 421 W 10th Street for use of transitional housing.

In addition, two public service agencies, CNPLS and Community Works, expended \$109,473.37 in CDBG-CV/CARES Act funds, serving 208 LMI individuals with legal services related to preventing eviction and supporting housing stability along with rental assistance for survivors of domestic violence.

The annual community meeting, a requirement of Oregon House Bill (HB) 4006, discussed rent burden causes and potential solutions in December 2021. Guest speaker included CNPLS to provide fair housing education to the community and engage in community dialogue to work towards addressing the need for affordable housing within the community.

The GFG program awarded \$265,300 to support services for low-income households and individuals, including assistance through food/nutrition; therapy and services for child abuse victims; emergency shelter, transitional housing, and services for those experiencing homelessness and victims of domestic violence; emergency shelter for homeless youth, medical care for individuals experiencing homelessness, and homelessness prevention through rental assistance. The City's merged funding platform, with staff coordinating CDBG and GFG funding and establishment of funding priorities as discussed previously above, will continue to drive enhanced performance and leveraged opportunities for low-income individuals and families for years to come.

The City consulted with Kaleidoscope Consulting to complete a Diversity, Equity, and Inclusion Assessment, identifying 32 recommended actions for consideration, leveraged through CDBG funding. The Commission on Access, Diversity, Equity, and Inclusion (CADEI) and staff lead development.

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.

All public service agencies receiving 2021 CDBG funding served homeless persons with outreach, services, and assistance to help transition to permanent housing, as discussed above, collectively serving 1,760 individuals.

CDBG funds also supported transitional housing for the CHOP (discussed above), serving eight individuals. Moreover, 2019 CDBG-CV funds supported rental assistance, homeless outreach, legal services and education, emergency shelter, and medical services, serving 1,570 individuals collectively within the PY.

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).

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.

Council prioritizes affordable housing development through a biennial goal to support the development of 200 affordable housing units for households earning up to 120% of AMI from 2021-23. In June 2022, Council approved the allocation of \$682,310 (\$400,000 from the local Construction Excise Tax and \$282,310 from Council Vision Funds) to fund four new affordable housing projects that will create 272 new residential units. This included funding HAJC with \$400,000 to support the development of two projects, totaling 196 units. Each project will develop 98 units and primarily serve General Family/Workforce individuals and family households, earning up to 60% Area Median Income (AMI). The Prescott Gardens project will be located at the 2100 block of Keene Way Drive and the Orchard Meadows project will be located at 1652 and 1634 Orchard Home Drive.

City staff also actively consults with the expertise of HAJC's Development Director Ryan Haynes through participation as a commissioner of the City's Housing Advisory Commission.

In addition to local funding opportunities, the HAJC also continues to apply for available funding through Oregon Housing and Community Services to develop housing to address the affordable housing needs in the community.

With a regional vacancy rate of 2%, the HAJC currently serves 2,164 Housing Choice Vouchers (HCVs) and Project-Based Vouchers (PBVs), 313 HUD-Veterans Affairs Supportive Housing (HUD-VASH) vouchers, and 12 Homeownership program participants in Jackson County, along with a housing portfolio of 1,519 long-term affordable units.

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

HAJC operates a Section 8 Voucher Homeownership program and a Family Self Sufficiency program within their HCV program, which offers clients homeownership education and opportunities. HAJC also offers homeownership education opportunities through Resident Services to public housing residents residing in HAJC's affordable housing units.

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 proclaimed April 2021 as Fair Housing Month, increasing awareness of fair housing issues.

In addition, the City's HOF contributed 15% of the revenue from construction excise tax to Oregon Housing and Community Services (OHCS) for homeownership assistance passed through ACCESS;

the City's contribution helps 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 effective policy changes. The following are examples of City actions/ordinances taken during the 2021 PY to address barriers to affordable housing:

- HB 2001 (Council Bill 2022-48) - Council approved amendments to the Land Development Code related to middle housing. The regulations allow properties zoned for single family residences to also allow for middle housing types including duplexes, triplexes, quadplexes, townhomes, and cottage clusters, providing opportunities for additional dwelling units to be constructed at differing price points to create more affordable housing options and ensure accommodations/needs are met for residents of all ages.
- Council Bill 2022-43 - To further encourage naturally occurring affordable housing, Council approved a \$150,000 allocation of ARPA funds to continue the Accessory Dwelling Unit (ADU) Systems Development Charge Reduction Program in May 2022. The initial program (from December 1, 2020 through June 1, 2022) incentivized the development of ADUs through reducing System Development Charges (SDCs) by 50% for new ADU building permits. The reduction of fees includes for Transportation, Sanitary Sewer Collection, Stormwater, and Parks (excluding Sanitary Sewer Treatment). After the 50% reduction of SDC fees, the City relieves the remaining 50%, including the Sanitary Sewer Treatment fee. The initial program successfully spurred the development of 31 new ADUs on private property in the first 13 months of the program. With a historical average of about 8-10 units per year, the program encourages above average development. The program's extension provides one additional year of funding (through June 30, 2023) by continuing to reduce the development cost of ADUs for participating homeowners and provide availability of 4 permit-ready designs for ADUs (including one design with an ADA accessible bedroom) to the public to help reduce overall ADU development costs.
- Council Bill 2022-28 - Manufactured Housing Code Change - This amendment modified the land use process for the development of manufactured dwelling parks from a Conditional Use Permit (CUP) to permitted outright with standards in the SFR-10 zoning district. It also established an administrative review process for approval of units when the site is less than nine acres in size.
- Council Bill 2021-124 - Amendment of Section 5.57 of the Medford Municipal Code - This amendment expanded the locations where overnight sleeping in a vehicle is permitted and increased the numbers of vehicles allowed for any public or private entity, faith-based or

secular, in compliance with specific safety and sanitary regulations outlined in the Code and with prior City approval through the City Manager's Office.

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

The City continued to strengthen and support the Medford Severe Weather Shelter program by helping to build a permanent severe weather shelter, which can also provide opportunities to connect homeless residents to other services during declared events. ACCESS assumed the primary shelter operator role during the FY 2022, organizing volunteers and locations at the Medford Senior Center, future Navigation Center, Library, and First Presbyterian Church. A permanent location at the existing Kelly Shelter location will be made available to the Severe Shelter when the Kelly Shelter moves to the Navigation Center. This was a direct result of the City's efforts to secure state funding and bring partners together.

The City's ongoing efforts to implement the Homeless System Action Plan (HSAP) continued to strengthen relationships with community partners to uncover opportunities that can more efficiently address obstacles. A good example is progress made during FY 2021 to develop a coordinated service delivery model at the Navigation Center which will be implemented in FY 2022. The City looks forward to up to 22 agencies providing on-site services to shelter guests at the Navigation Center. This will significantly reduce transportation and barriers resulting from staffing availability and funding.

In order to maintain focus on the priority needs of the underserved, the City appoints the Community Services and Development Commission (CSDC) as the advisory body to administer the CDBG program and to help identify and address priority needs. The CSDC is comprised of community members including a current member from the City Budget Committee; one representative from healthcare, social services, local business, workforce development, education, affordable housing; two members-at-large encouraging representation from throughout the whole community; and two members with lived experience regarding homelessness. This holistic approach was designed to have representation from multiple areas that directly interact with meeting underserved needs.

The CSDC 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 fields of lending, affordable housing development, multi-family housing operation, construction and development, and 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 CSDC 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% designated to essential safety net services and 50% 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 combined the funding cycles and application

processes for both the CDBG & GFG programs, in order to increase efficiency with limited staff capacity.

The City also consulted with Kaleidoscope Consulting to complete a Diversity, Equity, and Inclusion Assessment, identifying 32 recommended actions for consideration, leveraged through CDBG funding. The Commission on Access, Diversity, Equity, and Inclusion (CADEI) and staff lead development.

As mentioned previously, completion of the HSAP 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 46% of owner housing and 51% of rental housing built prior to 1980 as potential lead-based paint hazards. Data also concluded 36% of owner housing units and 64% of rental units built prior to 1980 are occupied by families with children, a combined 2,535 units. With this in mind, the City applied for the Housing and Urban Development (HUD) Office of Healthy Homes and Lead Hazard Control (OHHLHC) Lead Hazard Reduction Grant in July 2021 and was awarded the full request of \$2,140,542 in combined Lead Hazard Reduction (LHR) and Healthy Homes (HH) supplemental grant program funding. The primary objective of the LHR funding is to control lead-based paint hazards in 78-income eligible households and to leverage HH funding to address non-lead-related housing deficiencies in housing units with lead-based paint hazards by March 2025. A sub-goal of the program is to also build local contractor capacity needed to complete the specifications of this work. This program will result in the rehabilitation of housing stock to mitigate lead hazards and prioritize safe and healthy housing for households with children under the age of 6.

The City of Medford, in conjunction with the partner agency and subrecipient, Habitat for Humanity (HfH), has been working to build staff capacity and to draft the required framework and supporting documentation to effectively administer these grant programs. HfH hired a dedicated Program Manager who has received certifications to conduct lead inspections, risk assessments, and clearance examinations to administer and support the grant program and operations. The City of Medford hired a dedicated Housing Project Coordinator to support the grant program and operations. Equipment has been purchased, and a lab has been procured to test housing units for lead-based paint hazards.

The City of Medford also leveraged the Grant Technician's skills (garnered through pursuit of an MBA program) to begin effectively identifying potential neighborhoods to target LHR and HH funding through the utilization of ArcGIS' mapping analysis to understand key demographic indicators in census tracts, helping identify and prioritize targeted housing stock in areas with low-to-moderate income households, older housing stock, and concentrations of children under the

age of 6. HfH has also begun marketing the program towards targeted housing units and census tracts to prioritize neighborhoods and housing units with critical need of rehabilitation. In addition, HfH has begun outreach with local contractors and educating firms on this program, qualification requirements, and upcoming and available work generated as a result of the grant program.

HfH and the City will continue to work to build local contractor capacity and to qualify units for the grant program. The goal is to begin unit production and rehabilitate units as soon as applicants are qualified with qualified contractors available to complete the work.

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 2021 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:

All public service agencies receiving CDBG support during the 2021/22 PY worked to reduce the immediate and/or future poverty-level of those served. Families received emergency shelter, family reunification, safety net services, legal assistance to assist with eviction and homelessness prevention, homelessness prevention through emergency rental housing assistance, referral services, comprehensive case-management, mentorship, services to help transition out of homelessness, legal services and education, medical care for those experiencing homelessness, and vocational training for homeless youth. Expending \$113,119.95 in combined 2021 PY public service funding, \$14,000 in CDBG funding and \$290,169.60 in CDBG-CV funding, aiding 3,338 persons to help manage or overcome poverty and/or homelessness.

In addition, the City continues to support public service agencies through the GFG. Eleven agencies supported perform essential safety net services: ACCESS, CASA (Court Appointed Special Advocates) of Jackson County, Children's Advocacy Center, Community Works, Hearts With A Mission, La Clinica, Maslow Project, Rogue Retreat, Rogue Valley Council of Governments' (RVCOG) Food and Friends, Set Free Services, and St. Vincent de Paul, serving 19,246 individuals and households thus far.

Affordability of Owner-Occupied Units:

The City's 2020 HRP by HAJC served 11 LMI homeowners with housing repairs and weatherization assistance that not only allowed them to remain in their homes but may also result in a reduction of 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 2021 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 2021-23 Biennium:
 - a) Supported Council's goal to produce 200 affordable housing units for households earning under 120% AMI by funding four projects with a total of \$682,310 (from local HOF funding of \$400,000 and \$282,310 in Council Vision Funds) to develop 272 new affordable units and continuing to support affordable housing development through dedicating \$150,000 from ARPA to the reduce SDCs for ADUs;
 - b) Continued addressing unsheltered homelessness and encampments by funding the Medford Livability Team with City General Fund dollars and continuing the Chronically Homeless Outreach Partnership, a 24-agency working to help chronically homeless one person at a time with individualized and coordinated plans;
 - c) Increased collaboration with nonprofits, faith-based organizations, businesses and other government agencies through the CHOP, which also helped the City secure a \$120,000 grant from Providence to help renovate the Redwood Inn, also referred to as Project Turnkey.
 - d) Inspired the development of a coordinated services delivery model with approximately 22 agencies that will provide services onsite at the Navigation Center beginning in FY 2022, anticipated to serve up to 80 individuals and 20 family members at any given time with services including shelter, housing navigation, healthcare, behavioral health services, access to benefits, wellness programs, legal services, and credit counseling.
- 3) Hired a full-time Housing Project Coordinator in the Housing and Community Development (HCD) Division to administer Lead Hazard Reduction and Healthy Homes funding and complex housing and community development projects;
- 4) Continued to work with Council-appointed advisory bodies, including the CSDC and HAC, to impact housing development and address homelessness;
- 5) 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;
- 6) 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; and

7) The City's HCD staff continued to develop expertise in the administration of the CDBG program, which has improved capacity to manage two commissions, administer 6+ funding sources, seek additional grant funding, and implement 32 homeless actions and five goals.

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 Development Director of HAJC Ryan Haynes continues to serve on the Housing Advisory Commission, providing valuable insight into public and affordable housing.

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)

The City previously consulted with Root Policy Research to update the 2020-2024 Analysis of Impediments in the last PY, 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).

The two main challenges identified were:

1. High rates of housing problems and poverty within many of Medford's minority communities creates disproportionate housing needs
2. Some zone districts limit opportunities for residential housing types that help expand housing affordability

City staff utilized a Fair Housing Matrix to appropriately track the progress of overcoming all impediments identified in the City's 2020 Analysis of Impediments.

Progress made to address impediments include:

- **Reduce disproportionate housing needs**
 - Action 1: Support the increased production of affordable housing through public private partnerships:

- *Action 1.1: Leverage new sources of federal and state funds as they become available, prioritizing the product types and subsidy levels needed to reduce disproportionate housing needs among protected classes;*
 - Council approved supporting the development of 272 affordable housing units for four projects through the allocation of \$682,310 in local funding (\$400,000 from Construction Excise Tax and \$282,310 from Council Vision Funds).
 - OHCS awarded the City \$1 million for the acquisition of a vacant lot behind the Navigation Center to expand the campus including adding: additional parking for partners, a community garden, and an outdoor space for residents and pets.
 - OHCS also awarded the City of Medford \$536,000 for behavioral health staffing through partner agencies to support the behavioral health component of the Navigation Center.
 - Prior actions:
 - The City securing \$2.55 million in Project Turnkey funding (with Rogue Retreat as the primary operator and owner) from the Oregon Community Foundation to acquire the Redwood Inn Motel to convert to non-congregate, longer-term shelter/transitional housing to support Almeda Fire victims (as 630 individuals remain displaced in hotels with an additional 100 individuals in campsites), homeless individuals, and allow individuals experiencing homelessness to recover from COVID-19 and prevent the spread of the virus.
 - The City also secured \$2.5 million for the development of a navigation center, a 24/7 low-barrier emergency shelter with wraparound services for individuals experiencing homelessness, funded by the State of Oregon Legislature (under HB 2004 for funding and HB 2006 for policy).
- *Action 1.2: Require effective affirmative marketing of developers receiving public support;*
 - To be taken in future years.
- *Action 1.3: Develop and utilize a language access plan consistent with federal guidelines; make available to development partners.*
 - To be taken in future years.

- *Action 2: Continue the City's rental and owner home rehabilitation programs to address substandard housing conditions, focusing on areas of the city with older housing stock, concentrations of poverty, and concentrations of ethnic minorities.*
 - The City's investment through CDBG funding in the HAJC's Homeowner Repair program addressed substandard housing conditions through providing 11 LMI homeowners with housing rehabilitation to correct hazards to safety and habitability, helping homeowners remain in their homes.
 - The City, in partnership with subrecipient HfH, is working to administer the LHR and HH supplemental funding to mitigate the health and safety hazards of lead-based paint in the community. Recently hiring a Housing Project Coordinator, the City continues to grow administrative capacity to successfully administer this program.
- *Action 3: Expand access to home mortgage products among minority households with high denial rates and mitigate vulnerability to predatory lending:*
 - *Action 3.1: Encourage traditional financial and community development institutions to offer products addressing the needs of households utilizing and/or vulnerable to predatory lenders; and*
 - To be taken in future years.
 - *Action 3.2: Support counseling and predatory lending awareness services with a focus on high poverty neighborhoods in Medford.*
 - The City funded CNPLS with CDBG-CV to provide legal services to prevent, prepare for, and respond to the COVID-19 pandemic, serving 184 individuals.
 - The City also relies on the Homeownership Center at 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.

For struggling homeowners within the region, the Homeownership Center also 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, including during the current COVID pandemic.

- Prior actions:
 - The City funded CNPLS (in PY 20) with CDBG to assist with legal services (including fair housing issues, which may include predatory lending) for

CDBG funding expended in this PY served 28 LMI individuals.

- **Expand distribution of affordable housing throughout Medford**

- *Action 1: Expand zone districts in which multifamily uses are allowed by right. Given that minority residents have lower incomes, higher mortgage loan denial rates, and lower ownership rates, allowing multifamily products in more districts could reduce income segregation and broaden access to economic opportunity for minority households.*
 - HB 2001 passed, expanding the type of housing units permitted in all of the SFR zones to encourage development of affordable housing.
 - Prior actions:
 - Three City initiated zone changes were approved by the Planning Commission, helping to create multi-family zoning in different areas of the City to enable new development. The amount of land rezoned was 20.65 acres and 22 parcels. Properties were rezoned from single family zones to the multi-family zones. (ZC-20-256, ZC-20-324, & ZC-21-073)
- *Action 2: Expand zone districts in which small residential living facilities, such as Accessory Dwelling Units (ADUs) and/or fully self-contained tiny homes; manufactured homes; and duplexes and townhomes are allowed by right.*
 - The City extended the ADU SDC reduction program to stimulate naturally occurring affordable housing types and increased affordability through permit-ready ADU plans to further reduce the cost of development for homeowners.
 - Prior actions:
 - Executive Order 2020-03 provided for the use and establishment of temporary Recreational Vehicles (RV) outside of established RV parks and allowed for the use of manufactured homes as ADUs.

- **Further the City's commitment to affirmatively furthering fair housing and improving access to opportunity**

- *Action 1: Improve knowledge and awareness of fair housing laws and the City's requirement to AFFH*
 - *Action 1.1: Target fair housing education and outreach activities to populations with disproportionate housing needs*
 - The CNPLS provided legal services, including fair housing, for 184 LMI individuals using CDBG-CV funding.

- CNPLS staff presented during the December 14, 2021 Rent Burden Community meeting virtually and educated the community and staff regarding landlord tenant law and fair housing law.
- The City consulted with Kaleidoscope Consulting to complete the City's Diversity, Equity, and Inclusion Assessment in June 2022, which includes 32 recommended actions for consideration and was supported by CDBG.
- *Action 1.2: Continue organizing fair housing workshops and information sessions, focusing on expanding knowledge of rights among Hispanic and immigrant populations*
 - Staff worked with the CNPLS to organize fair housing trainings for the following target audience groups utilizing CDBG funding: Medford Planning Commission, Site Plan & Architectural Commission, Landmarks & Historic Preservation Commission, and Housing Advisory Commission.
 - CFNPLS staff presented during the virtual Rent Burden Community meeting, educating the community and staff regarding landlord tenant law and fair housing law.
 - Prior actions:
 - The City developed the 6-Step Toolkit for the Development of Affordable Housing through consulting with Luken Solutions and an adhoc team created with HAC commissioners, Housing Pipeline members, and CSDC commissioners to assist with helping garner community support for affordable housing projects. Project is anticipated to complete in December 2021.
- *Action 1.3: Implement affirmative marketing and language access plan initiatives*
 - To be taken in future years.
- *Action 2: Improve fair housing information on the city's website by making the information more user-friendly and less technical in nature, and linking directly to fair housing resources.*
 - Medford Mayor Randy Sparacino proclaimed April 2022 as Fair Housing Month to help build support, education, and awareness around fair housing rights.
 - Prior actions:
 - During the first PY, the City linked to Fair Housing Council of Oregon's website under the division's Affordable Housing Program webpage.

- Medford Mayor Randy Sparacino proclaimed April 2021 as Fair Housing Month to help build support, education, and awareness around fair housing rights.

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.

Include if the public notice was published in languages other than English and share if there were access to translation services, TDD/TTY services or a state relay number, or reasonable accommodations and/or access to related meetings for persons with disabilities.

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 2021 PY, onsite monitorings were delayed in response to the COVID-19 pandemic, but virtual monitorings occurred with OnTrack Rogue Valley's Hamilton Project and Youth 71Five's VoTech program. Subrecipients maintained compliance and in good standing; minimal concerns discovered by staff were addressed swiftly and satisfactorily.

In addition, City staff will seek to work closely with Rebuilding Together Rogue Valley (during the next PY) to assist with 2020 and 2021 projects. Previous challenges encountered include recent staff turnover at agency and complexity of project regulations.

Monitoring sessions included program eligibility, administration, reporting requirements, record keeping, client files, and financial reporting.

Staff continues to work closely with individual agencies to ensure efficiency and accuracy. Staff has recently utilized virtual trainings to assist with learning enhanced income verification procedures, as needed. Agencies that have participated in the previous income verification training include: the Rogue Valley YMCA, Kids Unlimited, CNPLS, Rebuilding Together Rogue Valley, and OnTrack. In the near future, staff plans to conduct a recorded virtual training to be published on the City's website with manual to be used to train future subrecipients.

In addition, staff continues to seek to further streamline the reporting process. Staff conducted thorough research on three prospective grant management software solutions and intends to select and implement software in the near future to assist with administrative capacity.

While the CAPER public notice was posted in English, accessibility and translation notices are posted on agendas of City meetings and will continue to be posted on public notices in the future. City meetings are generally accessible to persons with disabilities. Citizens needing translation services or other special accommodations may contact Angela Durant at least three business days prior to the hearing to request these services. A summary of public comments will be incorporated into the final document prior to submission to HUD. To request interpreters for hearing impaired or other accommodations for persons with disabilities, please contact the ADA Coordinator at (541) 774-2074 or ada@cityofmedford.org at least three business days prior to the meeting to ensure availability. For TTY, dial 711 or (800) 735 1232.

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 2020-2024 Consolidated Plan to assure citizens are presented with opportunity to provide input and be informed of program performance. During the 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 CSDC and 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 2021/22 CAPER, referred to hereafter as the 2020 CAPER, was facilitated through a mandatory public comment period and two public meetings. The public comment period opened on August 21, 2022 and will conclude on September 15, 2022. The CSDC will hold a meeting on September 7, 2022 to solicit citizen input and to approve the CAPER prior to submission to Council. City staff will present the CAPER during this meeting, and if approved, the CSDC will pass a motion approving the CAPER, as presented by staff. City Council will hold a public hearing at Medford City Hall, Council Chambers (or virtually) on Thursday, September 16, 2022 at 6:00 p.m. to solicit additional feedback and consider the CAPER for approval. Pending Council approval, City Council will then approve Resolution 2022-XX adopting the 2021 CAPER for submission to HUD.

X public comments were received.

The following Council actions relate to the 2021/22 Action Plan:

On June 6, 2019, Council approved Council Bill 2019-45, adopting the 2019-2021 Biennial Budget.

On May 7, 2020, Council approved Council Bill 2020-54, adopting the 2020-2024 Consolidated Plan.

On May 6, 2021, Council approved Council Bill 2021-35, adopting the 2021 Action Plan.

On August 5, 2021, Council approved Council Bill 2021-87, adopting a Substantial Amendment to the 2021 Action Plan.

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 2021 PY, even with the extenuating circumstances caused by the coronavirus pandemic and Almeda Fire. Consolidated Plan goals focus on improving and increasing affordable housing, improving access to public services and improving neighborhood conditions. Of the strategies identified in the Consolidated Plan, the following have not yet been implemented during the first two years of the Consolidated Plan:

- Create affordable housing opportunities and diversify the types of housing in downtown Medford and other areas by implementing strategies from the City Center Revitalization Plan and Liberty Park Neighborhood Plan.
- Support weatherization programs and incentives to support landlords in improving rental properties serving low- to moderate-income households.
- Support programs that promote a community-wide culture of inclusion, such as neighborhood or outreach programs that engage low- to moderate-income households, people of color, people experiencing homelessness, people living with disabilities and/or mental health issues, seniors, and youth in community discussions.
- Support the removal of dilapidated structures and other blighting influences in low- to moderate income areas, designated slum and blight areas, and citywide on a spot-blight basis in accordance with HUD regulations. Actively enforce City codes to improve the habitability and safety of housing and to eliminate blighting influences in neighborhoods.
- Provide planning assistance toward the development of a Jackson School Neighborhood Plan and a Washington School Neighborhood Plan. The City identified an intention to provide similar planning assistance for the Union Park Neighborhood and the Cottage Street Neighborhood in the City's next consolidated plan.

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

No.

Appendix A – Financial Summary (PR-26)

Office of Community Planning and Development Integrated Disbursement and Information System PR-26



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Program Year 2021
MEDFORD, OR

PART I: SUMMARY OF CDBG RESOURCES

01 UNEXPENDED CDBG FUNDS AT END OF PREVIOUS PROGRAM YEAR	1,094,727.89
02 ENTITLEMENT GRANT	754,194.00
03 SURPLUS URBAN RENEWAL	0.00
04 SECTION 108 GUARANTEED LOAN FUNDS	0.00
05 CURRENT YEAR PROGRAM INCOME	141,080.40
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)	1,990,002.29

PART II: SUMMARY OF CDBG EXPENDITURES

09 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	791,616.99
10 ADJUSTMENT TO COMPUTE TOTAL AMOUNT SUBJECT TO LOW/MOD BENEFIT	0.00
11 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 09 + LINE 10)	791,616.99
12 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	145,674.72
13 DISBURSED IN IDIS FOR SECTION 108 REPAYMENTS	0.00
14 ADJUSTMENT TO COMPUTE TOTAL EXPENDITURES	0.00
15 TOTAL EXPENDITURES (SUM, LINES 11-14)	937,291.71
16 UNEXPENDED BALANCE (LINE 08 - LINE 15)	1,052,710.58

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	20,561.80
19 DISBURSED FOR OTHER LOW/MOD ACTIVITIES	452,003.04
20 ADJUSTMENT TO COMPUTE TOTAL LOW/MOD CREDIT	319,052.20
21 TOTAL LOW/MOD CREDIT (SUM, LINES 17-20)	791,617.04
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 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	127,145.18
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	0.00
31 TOTAL PS OBLIGATIONS (LINE 27 + LINE 28 - LINE 29 + LINE 30)	127,145.18
32 ENTITLEMENT GRANT	754,194.00
33 PRIOR YEAR PROGRAM INCOME	366,101.09
34 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP	0.00
35 TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34)	1,120,295.09
36 PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35)	11.35%

PART V: PLANNING AND ADMINISTRATION (PA) CAP

37 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	145,674.72
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	0.00
41 TOTAL PA OBLIGATIONS (LINE 37 + LINE 38 - LINE 39 +LINE 40)	145,674.72
42 ENTITLEMENT GRANT	754,194.00
43 CURRENT YEAR PROGRAM INCOME	141,080.40
44 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PA CAP	0.00
45 TOTAL SUBJECT TO PA CAP (SUM, LINES 42-44)	895,274.40
46 PERCENT FUNDS OBLIGATED FOR PA ACTIVITIES (LINE 41/LINE 45)	16.27%

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
2020	13	448	ColumbiaCare - Acquisition of 1316 W. Main Street for Veterans Housing (2020)	14G	LMH	\$315,184.13
				14G	Matrix Code 14G	<u>\$315,184.13</u>
Total						\$315,184.13

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
2021	9	475	6619392	Youth 71 Five - VoTech Expansion	01	LMC	\$2,315.16
2021	9	475	6627972	Youth 71 Five - VoTech Expansion	01	LMC	\$2,069.24
2021	9	475	6649772	Youth 71 Five - VoTech Expansion	01	LMC	\$995.93
2021	9	475	6666834	Youth 71 Five - VoTech Expansion	01	LMC	\$406.15
2021	9	475	6674665	Youth 71 Five - VoTech Expansion	01	LMC	\$2,850.00
					01	Matrix Code 01	\$8,636.48
2019	7	431	6619392	Compass House - Property Renovation Phase II (2019)	03B	LMC	\$958.58
2019	7	431	6627972	Compass House - Property Renovation Phase II (2019)	03B	LMC	\$39,844.09
2019	7	431	6649772	Compass House - Property Renovation Phase II (2019)	03B	LMC	\$666.56
2019	7	431	6666834	Compass House - Property Renovation Phase II (2019)	03B	LMC	\$24,876.61
					03B	Matrix Code 03B	\$66,345.84
2020	19	465	6619392	OnTrack - Renovation of 421 W 10th Street for Non-Congregate Shelter (2020)	03C	LMC	\$4,671.37
2020	19	465	6627972	OnTrack - Renovation of 421 W 10th Street for Non-Congregate Shelter (2020)	03C	LMC	\$474.51
2020	19	465	6649772	OnTrack - Renovation of 421 W 10th Street for Non-Congregate Shelter (2020)	03C	LMC	\$73.70
2020	19	465	6666834	OnTrack - Renovation of 421 W 10th Street for Non-Congregate Shelter (2020)	03C	LMC	\$332.48
2021	5	476	6619392	Hearts With A Mission - Transitional Living Program Home Rehabilitation	03C	LMC	\$1,060.33
					03C	Matrix Code 03C	\$6,612.39
2020	20	466	6627972	City of Medford, through Rogue Retreat - Lease of 421 W 10th Street in Support of the CHOP (2020)	03T	LMC	\$10,000.00
2020	20	466	6649772	City of Medford, through Rogue Retreat - Lease of 421 W 10th Street in Support of the CHOP (2020)	03T	LMC	\$4,025.23
2021	1	469	6619392	Hearts With A Mission PSP - Medford Youth Shelter (2021)	03T	LMC	\$11,252.00
2021	1	469	6627972	Hearts With A Mission PSP - Medford Youth Shelter (2021)	03T	LMC	\$5,617.00
2021	1	469	6651824	Hearts With A Mission PSP - Medford Youth Shelter (2021)	03T	LMC	\$5,617.00
2021	2	470	6619392	Maslow Project - Maslow's Navigation/Resource One-Stop Center (2021)	03T	LMC	\$19,277.81
2021	2	470	6627972	Maslow Project - Maslow's Navigation/Resource One-Stop Center (2021)	03T	LMC	\$9,214.23

2021	2	470	6651824	Maslow Project - Maslow's Navigation/Resource One-Stop Center (2021)	03T	LMC	\$11,499.91
2021	3	471	6627972	Rogue Retreat - Year-Round Shelter Service (2021)	03T	LMC	\$25,000.00
2021	4	472	6627972	Youth 71Five Ministries - Vocational Training/VoTech PSP (2021)	03T	LMC	\$19,228.78
2021	4	472	6651824	Youth 71Five Ministries - Vocational Training/VoTech PSP (2021)	03T	LMC	\$4,771.22
2021	11	473	6649772	ACCESS - Medford Severe Weather Shelter Operations (2021)	03T	LMC	\$1,642.00
					03T	Matrix Code 03T	\$127,145.18
2020	10	449	6554491	Housing Authority of Jackson County - Homeowner Repair Program 2020	14A	LMH	\$59,122.52
2020	10	449	6619392	Housing Authority of Jackson County - Homeowner Repair Program 2020	14A	LMH	\$59,321.88
2020	10	449	6627972	Housing Authority of Jackson County - Homeowner Repair Program 2020	14A	LMH	\$124,818.75
					14A	Matrix Code 14A	\$243,263.15
Total							\$452,003.04

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

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity to prevent, prepare for, and respond to Coronavirus	Activity Name	Grant Number	Fund Type	Matrix Code	National Objective	Drawn Amount
2020	20	466	6627972	No	City of Medford, through Rogue Retreat - Lease of 421 W 10th Street in Support of the CHOP (2020)	B20MC410005 PI	03T	LMC		\$10,000.00
2020	20	466	6649772	No	City of Medford, through Rogue Retreat - Lease of 421 W 10th Street in Support of the CHOP (2020)	B20MC410005 PI	03T	LMC		\$4,025.23
2021	1	469	6619392	No	Hearts With A Mission PSP - Medford Youth Shelter (2021)	B21MC410005 EN	03T	LMC		\$11,252.00
2021	1	469	6627972	No	Hearts With A Mission PSP - Medford Youth Shelter (2021)	B21MC410005 EN	03T	LMC		\$5,617.00
2021	1	469	6651824	No	Hearts With A Mission PSP - Medford Youth Shelter (2021)	B21MC410005 PI	03T	LMC		\$5,617.00
2021	2	470	6619392	No	Maslow Project - Maslow's Navigation/Resource One-Stop Center (2021)	B21MC410005 EN	03T	LMC		\$19,277.81
2021	2	470	6627972	No	Maslow Project - Maslow's Navigation/Resource One-Stop Center (2021)	B21MC410005 EN	03T	LMC		\$9,214.23
2021	2	470	6651824	No	Maslow Project - Maslow's Navigation/Resource One-Stop Center (2021)	B21MC410005 PI	03T	LMC		\$11,499.91
2021	3	471	6627972	No	Rogue Retreat - Year-Round Shelter Service (2021)	B21MC410005 EN	03T	LMC		\$25,000.00
2021	4	472	6627972	No	Youth 71Five Ministries - Vocational Training/VoTech PSP (2021)	B21MC410005 EN	03T	LMC		\$19,228.78
2021	4	472	6651824	No	Youth 71Five Ministries - Vocational Training/VoTech PSP (2021)	B21MC410005 PI	03T	LMC		\$4,771.22
2021	11	473	6649772	No	ACCESS - Medford Severe Weather Shelter Operations (2021)	B21MC410005 EN	03T	LMC		\$1,642.00
						03T	Matrix Code 03T			\$127,145.18
Total				No	Activity to prevent, prepare for, and respond to Coronavirus					\$127,145.18
										\$127,145.18

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
2020	15	454	6649772	Fair Housing Education and Awareness (Planning Activity) (2020)	20		\$5,000.00
2020	16	455	6619392	6-Step Toolkit for the Development of Affordable Housing (Planning Activity) (2020)	20		\$2,000.00
2020	16	455	6666834	6-Step Toolkit for the Development of Affordable Housing (Planning Activity) (2020)	20		\$8,500.00
2020	17	456	6649772	Planning and Capacity Building for the Potential Creation of a Navigation Center	20		\$2,500.00
2020	17	456	6674665	Planning and Capacity Building for the Potential Creation of a Navigation Center	20		\$23,000.00
2020	17	456	6627972	Planning and Capacity Building for the Potential Creation of a Navigation Center	20		\$23,000.00
					20	Matrix Code 20	\$64,000.00
2021	10	468	6609831	Program Administration - 2021/22 PY	21A		\$31,996.61
2021	10	468	6619392	Program Administration - 2021/22 PY	21A		\$28,354.56
2021	10	468	6627972	Program Administration - 2021/22 PY	21A		\$7,035.96
2021	10	468	6649772	Program Administration - 2021/22 PY	21A		\$2,750.46
2021	10	468	6666834	Program Administration - 2021/22 PY	21A		\$11,537.13
					21A	Matrix Code 21A	\$81,674.72
Total							\$145,674.72

**Office of Community Planning and Development
Integrated Disbursement and Information System
PR-26 CDBG-CV**



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Program Year 2021
MEDFORD, OR

PART I: SUMMARY OF CDBG-CV RESOURCES

01 CDBG-CV GRANT	958,225.00
02 FUNDS RETURNED TO THE LINE-OF-CREDIT	0.00
03 FUNDS RETURNED TO THE LOCAL CDBG ACCOUNT	0.00
04 TOTAL AVAILABLE (SUM, LINES 01-03)	958,225.00

PART II: SUMMARY OF CDBG-CV EXPENDITURES

05 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	468,328.13
06 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	65,486.79
07 DISBURSED IN IDIS FOR SECTION 108 REPAYMENTS	0.00
08 TOTAL EXPENDITURES (SUM, LINES 05 - 07)	533,814.92
09 UNEXPENDED BALANCE (LINE 04 - LINE8)	424,410.08

PART III: LOWMOD BENEFIT FOR THE CDBG-CV GRANT

10 EXPENDED FOR LOW/MOD HOUSING IN SPECIAL AREAS	0.00
11 EXPENDED FOR LOW/MOD MULTI-UNIT HOUSING	0.00
12 DISBURSED FOR OTHER LOW/MOD ACTIVITIES	468,328.13
13 TOTAL LOW/MOD CREDIT (SUM, LINES 10 - 12)	468,328.13
14 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 05)	468,328.13
15 PERCENT LOW/MOD CREDIT (LINE 13/LINE 14)	100.00%

PART IV: PUBLIC SERVICE (PS) CALCULATIONS

16 DISBURSED IN IDIS FOR PUBLIC SERVICES	468,328.13
17 CDBG-CV GRANT	958,225.00
18 PERCENT OF FUNDS DISBURSED FOR PS ACTIVITIES (LINE 16/LINE 17)	48.87%

PART V: PLANNING AND ADMINISTRATION (PA) CAP

19 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	65,486.79
20 CDBG-CV GRANT	958,225.00
21 PERCENT OF FUNDS DISBURSED FOR PA ACTIVITIES (LINE 19/LINE 20)	6.83%

LINE 10 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 10
 Report returned no data.

LINE 11 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 11
 Report returned no data.

LINE 12 DETAIL: ACTIVITIES INCLUDED IN THE COMPUTATION OF LINE 12

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2019	14	436	6473109	CV - St. Vincent de Paul COVID-19 Rent Relief Program	05Q	LMC	\$90,985.10
			6535814	CV - St. Vincent de Paul COVID-19 Rent Relief Program	05Q	LMC	\$59,946.24
	15	438	6535814	CV - Community Works Emergency Rent Payments Program	05Q	LMC	\$24,526.63
			6619392	CV - Community Works Emergency Rent Payments Program	05Q	LMC	\$15,473.37
	17	437	6554491	CV - Center for Nonprofit Legal Services Related to COVID-19 Program	05C	LMC	\$61,890.00
			6619392	CV - Center for Nonprofit Legal Services Related to COVID-19 Program	05C	LMC	\$32,110.00
	18	459	6627972	CV3 - Rogue Retreat - Project Turnkey Longer-Term Shelter/Transitional Housing & Operations 2019	03T	LMC	\$21,527.80
			6649772	CV3 - Rogue Retreat - Project Turnkey Longer-Term Shelter/Transitional Housing & Operations 2019	03T	LMC	\$50,067.73
			6666834	CV3 - Rogue Retreat - Project Turnkey Longer-Term Shelter/Transitional Housing & Operations 2019	03T	LMC	\$5,094.70
	21	462	6554491	CV - City of Medford - Urban Campground Property Lease	03T	LMC	\$12,000.00
			6619392	CV - City of Medford - Urban Campground Property Lease	03T	LMC	\$10,800.00
			6627972	CV - City of Medford - Urban Campground Property Lease	03T	LMC	\$1,600.00
			6649772	CV - City of Medford - Urban Campground Property Lease	03T	LMC	\$1,600.00
	22	463	6627972	CV - La Clinica - Urban Campground Mobile Medical Clinic	05M	LMC	\$21,766.97
			6649772	CV - La Clinica - Urban Campground Mobile Medical Clinic	05M	LMC	\$1,477.36
			6666834	CV - La Clinica - Urban Campground Mobile Medical Clinic	05M	LMC	\$18,742.39
			6674665	CV - La Clinica - Urban Campground Mobile Medical Clinic	05M	LMC	\$8,584.23
	23	464	6649772	CV - ACCESS - Homeless Outreach Specialist	03T	LMC	\$37.86
			6666834	CV - ACCESS - Homeless Outreach Specialist	03T	LMC	\$138.09
			6674665	CV - ACCESS - Homeless Outreach Specialist	03T	LMC	\$29,959.66
Total							\$468,328.13

LINE 16 DETAIL: ACTIVITIES INCLUDED IN THE COMPUTATION OF LINE 16

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity Name	Matrix Code	National Objective	Drawn Amount
2019	14	436	6473109	CV - St. Vincent de Paul COVID-19 Rent Relief Program	05Q	LMC	\$90,985.10
			6535814	CV - St. Vincent de Paul COVID-19 Rent Relief Program	05Q	LMC	\$59,946.24
	15	438	6535814	CV - Community Works Emergency Rent Payments Program	05Q	LMC	\$24,526.63

		6619392	CV - Community Works Emergency Rent Payments Program	05Q	LMC	\$15,473.37	
17	437	6554491	CV - Center for Nonprofit Legal Services Related to COVID-19 Program	05C	LMC	\$61,890.00	
		6619392	CV - Center for Nonprofit Legal Services Related to COVID-19 Program	05C	LMC	\$32,110.00	
18	459	6627972	CV3 - Rogue Retreat - Project Turnkey Longer-Term Shelter/Transitional Housing & Operations 2019	03T	LMC	\$21,527.80	
		6649772	CV3 - Rogue Retreat - Project Turnkey Longer-Term Shelter/Transitional Housing & Operations 2019	03T	LMC	\$50,067.73	
		6666834	CV3 - Rogue Retreat - Project Turnkey Longer-Term Shelter/Transitional Housing & Operations 2019	03T	LMC	\$5,094.70	
21	462	6554491	CV - City of Medford - Urban Campground Property Lease	03T	LMC	\$12,000.00	
		6619392	CV - City of Medford - Urban Campground Property Lease	03T	LMC	\$10,800.00	
		6627972	CV - City of Medford - Urban Campground Property Lease	03T	LMC	\$1,600.00	
22	463	6627972	CV - City of Medford - Urban Campground Property Lease	03T	LMC	\$1,600.00	
		6649772	CV - La Clinica - Urban Campground Mobile Medical Clinic	05M	LMC	\$21,766.97	
		6666834	CV - La Clinica - Urban Campground Mobile Medical Clinic	05M	LMC	\$18,742.39	
		6674665	CV - La Clinica - Urban Campground Mobile Medical Clinic	05M	LMC	\$8,584.23	
23	464	6649772	CV - ACCESS - Homeless Outreach Specialist	03T	LMC	\$37.86	
		6666834	CV - ACCESS - Homeless Outreach Specialist	03T	LMC	\$138.09	
		6674665	CV - ACCESS - Homeless Outreach Specialist	03T	LMC	\$29,959.66	
Total						\$468,328.13	
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
2019	19	460	6619392	CV3 - City of Medford Diversity, Equity, and Inclusion Plan	20		\$30,900.00
			6666834	CV3 - City of Medford Diversity, Equity, and Inclusion Plan	20		\$19,100.00
	20	461	6554491	CV3 - City of Medford CDBG - CV3 General Program Administration	21A		\$809.66
			6619392	CV3 - City of Medford CDBG - CV3 General Program Administration	21A		\$7,522.64
			6627972	CV3 - City of Medford CDBG - CV3 General Program Administration	21A		\$2,196.14
			6666834	CV3 - City of Medford CDBG - CV3 General Program Administration	21A		\$4,958.35
Total							\$65,486.79

Appendix B – Resolution 2022-XX

To be inserted after approval.

Appendix C – Affidavit

To be inserted after approval.