

City of Medford
Community Development Block Grant (CDBG) &
HOME Investment Partnerships



2025/26 Consolidated Annual
Performance Evaluation Report
(CAPER)

July 1, 2025, through June 30, 2026

Housing and Community Development Division
Planning Department
200 S. Ivy Street
Medford, OR 97501
541-774-2398
hcd@cityofmedford.org

CITY OF MEDFORD

Michael Zarosinski, Mayor
John Vial, Interim City Manager

MEDFORD CITY COUNCIL

Jessica Ayres, Ward 1	Zac Smith, Ward 2	Kevin Stine, Ward 3	Nick Card, Ward 4
Mike Kerlinger, Ward 1	John Quinn, Ward 2	Garrett West, Ward 3	Kevin Keating, Ward 4

HOUSING AND COMMUNITY DEVELOPMENT COMMISSION

- | | |
|---|---|
| — Tyler Jasper, Chair, At Large Representative | — Mike Kerlinger, City Council Liaison |
| — Debra Lee, Vice Chair, Tenant Organization Representative | — Kevin Keating, City Council Liaison (Alternate) |
| — Diana Bennington, Social Services Representative | — Michelle King, Planning Director |
| — Ryan De Mello, Construction & Development Representative | — Carla Paladino, Staff Liaison |
| — Steven Erb, Lending Institution Representative | — Sheila Giorgetti, Staff Liaison |
| — Zack Fappiano, At-Large Representative | — Zac Thompson, Staff Liaison |
| — Ryan Haynes, Housing Authority of Jackson County Representative | — Kendra Blaylock, Staff Liaison |
| — Denise James, Affordable Housing Representative | — Eric Mitton, Legal Staff Liaison |
| — Bob Mylenek, Local Employer Representative | — Allen Moreland, Legal Staff Liaison |
| — Shannon Sakoman, Lived Experience Representative | |

PREPARED BY HOUSING AND COMMUNITY DEVELOPMENT DIVISION STAFF

Sheila Giorgetti, Grants Program Manager
Kendra Blaylock, Grants Technician
Zac Thompson, Grants Program Manager

TABLE OF CONTENTS

LIST OF TABLES	ii
CR-05 - Goals and Outcomes 91.520(a), 91.520(g).....	1
CR-10 - Racial and Ethnic Composition of Families Assisted 91.520(a).....	11
CR-15 - Resources and Investments 91.520(a).....	12
HOME MBE/WBE Report	15
CR-20 - Affordable Housing 91.520(b)	18
CR-25 - Homeless and Other Special Needs 91.220(d, e); 91.320(d, e); 91.520(c).....	21
CR-30 - Public Housing 91.220(h); 91.320(j).....	24
CR-35 - Other Actions 91.220(j)-(k); 91.320(i)-(j)	26
CR-40 - Monitoring 91.220 and 91.230	31
Citizen Participation Plan 91.105(d); 91.115(d)	32
CR-45 - CDBG Misc. 91.520(c)	33
CR-50 - HOME 24 CFR 91.520(d)	33
CR-58 – Section 3	35
Appendix A – Financial Summary (PR-26).....	38
Appendix B – Resolution 2026-58	44
Appendix C – Affidavit	45
Appendix D - Public Comments	46

LIST OF TABLES

Table 1 – Accomplishments – 2025/26 Program Year	2
Table 2 – Strategic Plan to Date (2025-29 Consolidated Plan).....	7
Table 3 – Assistance to Racial and Ethnic Populations by Source of Funds	11
Table 4 – Resources Made Available.....	12
Table 5 – Geographic Distribution and Location of Investments	12
Table 6 – Fiscal Year Summary - HOME Match	14
Table 7 - Match Contribution for the Federal Fiscal Year.....	14
Table 8 – HOME Program Income.....	15
Table 9 - Minority Business Enterprises and Women Business Enterprises	15
Table 10 - Minority Owners of Rental Property	16
Table 11 - Relocation and Real Property Acquisition	16
Table 12 – Households Provided Affordable Housing Units.....	18
Table 13 – Households Provided Affordable Housing Support.....	18
Table 14 – Extremely Low- and Low-Income Households Served.....	19
Table 15 - Total Labor Hours - Section 3	35
Table 16 - Qualitative Efforts by Program - Section 3.....	35

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 City of Medford is an entitlement jurisdiction that receives Community Development Block Grant (CDBG) and HOME Investment Partnerships (HOME) funds annually from the U.S. Department of Housing and Urban Development (HUD). As a recipient, the City is required to prepare a Consolidated Plan. This is a 5-year strategic plan that identifies housing and community needs, prioritizes those needs, identifies resources to address the needs, and establishes annual goals and objectives to meet the identified needs.

The outcome indicators for the 5-year and annual plans are estimates made months and years before actual funding levels and project applicants are known; therefore, there are uncertainties, especially in the number and unit of measure.

The 2025/26 Program Year (PY), referred to hereafter as PY 2025, marked the first year of the 2025-2029 Consolidated Plan. Throughout the year, the City focused primarily on strategies to increase services and 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.

CDBG funding was provided to twelve service providers during PY 2025; of these, four were carry-over projects from prior program years. Combined, partner agencies served 7,047- people during the year.

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 PY 2025 – see Table 1 for descriptions of objectives referenced in this section.

Table 1 – Accomplishments – 2025/26 Program Year

Goal	Description	Indicator	Expected Program Year Outcome	Actual Program Year Outcome	Unit of Measure	Percent Complete
1	Expand and Improve Affordable Housing Options Support the production, acquisition, and rehabilitation of affordable rental and owner-occupied housing. Includes homeownership assistance, rental assistance, and accessibility improvements. Focus on housing affordable to households with income at or below 80% HAMFI, while diversifying the housing stock across the city.	Homeowner Housing Rehabilitated - Habitat for Humanity – Homeowner Repair Program (2024)	15	2	Housing Units	13%
		Rental Units Rehabilitated - ACCESS (2025)	8	13	Housing Units	163%
2	Support and Strengthen Homeless Services and Housing Provide emergency shelter, transitional housing, permanent supportive housing, and rental assistance to stabilize vulnerable populations and prevent homelessness.	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit - Crossings Paving Improvements (2024) (329) - Youth 71Five Ministries – 106 VoTech Campus Housing (2025) (0)	600	329	Persons Assisted	55%
		Homeless Person Overnight Shelter - Hearts With A Mission – Transitional Living Program (2025)	16	15	Persons Assisted	94%

Goal	Description	Indicator	Expected Program Year Outcome	Actual Program Year Outcome	Unit of Measure	Percent Complete
		Overnight/Emergency Shelter/Transitional Housing Beds Added: - None	0	0	Persons Assisted	N/A
		Homelessness Prevention - None	0	0	Beds Added/ Persons Assisted	N/A
3	Ensure Access to Social Services and Fair Housing Provide emergency shelter, transitional housing, permanent supportive housing, and rental assistance to stabilize vulnerable populations and prevent homelessness.	Public Service Activities other than Low/Moderate Income Housing Benefit: - Center for NonProfit Legal Services – Building Housing Stabilization & Resiliency (2025) (57) - La Clinica – Health Outreach Services (2025) (1,342) - Maslow Project – Wrap-Around Family Advocacy Services (2025) (1,624) - The Salvation Army – Homeless to Housing (2025) (270)	3,690	3,293	Persons Assisted	89%
		Homeless Person Overnight Shelter - None	0	0	Persons Assisted	N/A

Goal	Description	Indicator	Expected Program Year Outcome	Actual Program Year Outcome	Unit of Measure	Percent Complete
		Overnight/Emergency Shelter/Transitional Housing Beds added - None	0	0	Beds	N/A
4	Improve Infrastructure and Public Facilities in Low-Income Areas Invest in public infrastructure improvements such as streets, sidewalks, lighting, sewer systems, and community facilities to improve quality of life in low-income neighborhoods.	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit - Jackson Pool Demolition & Site Renovation (2024) (0) - Santo Community Center Structural Improvements (2024) (3,395) - Jackson Pool Aquatic Building Renovation (2025) (0)	5,307	3,395	Persons	64%
5	Promote Economic Development and Workforce Opportunities Expand job training, workforce readiness programs, and employment support services. Encourage business development and entrepreneurship among low-income residents.	Jobs Created/Retained - None	0	0	Jobs	N/A
		Businesses Assisted - None	0	0	Businesses Assisted	N/A

Goal	Description	Indicator	Expected Program Year Outcome	Actual Program Year Outcome	Unit of Measure	Percent Complete
6	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.	Housing Code Enforcement/ Foreclosed Property Care: - None	0	0	Household Housing Units	N/A

Four activities carried over from the 2020-2024 Consolidated Plan to the 2025-2029 Consolidated Plan. Three of these activities reported outcomes during Program Year 2025 that were not aligned with current Consolidated Plan goals. This caused the reported outcomes in IDIS to differ from actual outcomes tracked by City staff.

Subrecipient	Activity	2020-2024 ConPlan Goal	2025-2029 ConPlan Goal	Outcomes
Habitat for Humanity Rogue Valley	Critical Homeowner Repair	1 – Expand and Improve Affordable Housing Options	1 – Expand and Improve Affordable Housing Options	2
City of Medford Parks, Recreation & Facilities Department	Jackson Pool Demolition and Site Revitalization	4 – Improve Quality of Life through Neighborhood Revitalization	4 – Improve Infrastructure and Public Facilities in Low-Income Areas	0
City of Medford Parks, Recreation, & Facilities Department	Santo Community Center Structural Improvements	4 – Improve Quality of Life through Neighborhood Revitalization	4 – Improve Infrastructure and Public Facilities in Low-Income Areas	3,395
City of Medford and Rogue Retreat	Crossings Paving Improvements	2 – Support and Strengthen Homeless Services and Housing	2 – Support and Strengthen Homeless Services and Housing	329

Table 2 – Strategic Plan to Date (2025-29 Consolidated Plan)

Goal	Description	5-Year Funding	Indicator	Expected Strategic Plan Outcome	Actual Strategic Plan Outcome	Unit of Measure	Percent Complete
1	Affordable Housing	CDBG: \$1,888,020 HOME: \$1,754,271	Homeowner Housing Rehabilitated	150	2	Housing Units	1%
			Rental Housing Rehabilitated	50	13	Households	26%
			Housing for Homeless Added	30		Housing Units	%
2	Homeless Services & Housing	CDBG: \$505,469	Public Facility or Infrastructure other than Low/Moderate Income Housing Benefit	0	0	Persons	0%
			Homeless Person Overnight Shelter	2,000	0	Persons	0%
			Overnight/Emergency Shelter/Transitional Housing Beds Added	0	0	Beds	0%
			Homeless Prevention	500	15	Persons	3%
3	Social Services & Fair Housing	\$263,019	Public Service Activities other than Low/Moderate Income Housing Benefit	3,000	3,293	Persons	110%
			Homeless Person Overnight Shelter	0	0	Persons	0%
			Overnight/Emergency Shelter/Transitional Housing Beds Added	0	0	Beds	0%
4	Infrastructure & Public Facilities	\$693,019	Public Facility/Infrastructure other than Low/Moderate Income Housing Benefit	1,500	3,395	Persons	226%
5	Economic Development & Workforce Opportunities	\$138,018	Jobs Created/Retained	75	0	Jobs	0%
			Businesses Assisted	50	0	Businesses	0%
6	Neighborhood Revitalization	\$138,018	Housing Code Enforcement/Foreclosed Property Care	25	0	Household Housing Units	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 six goals. The goals and accomplishments made during PY 2025 are referenced below:

Goal 1) Expand and Improve Affordable Housing Options

Under the 2025-2029 Consolidated Plan, the City allows for the use of several strategies to improve and maintain existing housing and to create more opportunities for low- to moderate-income (LMI) residents to secure affordable and livable housing. Strategies incorporated during PY 2025 included no-interest loans for homeowner housing rehabilitation and rental housing rehabilitation for LMI households.

Homeowner Housing Rehabilitated:

Habitat for Humanity Rogue Valley administered the Critical Homeowner Repair Program and completed repairs on two homes. More homes are projected for repairs in PY2026.

Rental Housing Rehabilitated:

ACCESS Inc. rehabilitated eight rental units occupied by LMI households. Renovations included roof replacement, new water heaters, and updated air conditioning units.

Goal 2) Support and Strengthen Homeless Services and Housing

Medford City Council continues to support and strengthen homeless services and housing through prioritizing and 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.

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

The City of Medford, in partnership with Rogue Retreat, improved access in and out of Crossings, an urban campground, by paving the driveway and pathways within the campground. Access to the facilities was greatly inhibited during the rainy winter season and the improvements benefit vehicular and pedestrian traffic.

Youth 71Five Ministries will assist 100 individuals in PY2026 through their 106 VoTech Campus Housing activity. A residential home will be renovated to add bed space for young people experiencing homelessness.

Homeless Person Overnight Shelter:

Hearts With A Mission rehabilitated their transitional living program facility by repairing and upgrading the roof, heating and cooling systems, insulation, and windows. This facility serves as

transitional housing for youth experiencing homelessness; 15 people were served by these facility improvements.

Goal 3) Ensure Access to Social Services and Fair Housing

The City continued to use the HUD-allowable CDBG public service allocation for PY 2025 of \$92,334 to four nonprofits addressing priority needs, particularly homeless services and emergency shelter services. Public service activities were supported through Center for NonProfit Legal Services, La Clinica, Maslow Project, and The Salvation Army; collectively, these organizations helped 3,293 individuals with services aimed at increasing self-sufficiency.

Goal 4) Improve Infrastructure and Public Facilities in Low-Income Areas

The City of Medford Parks, Recreation and Facilities Department will serve 3,835 LMI individuals (1,380 households) in Census Tract 2.01 by demolishing an aged and failing swimming pool and revitalizing the site for neighborhood use. The pool, located in Jackson Park, has been demolished and the ground filled in; the site is being prepared for future public use. This project is expected to be completed during PY2026.

The City of Medford Parks, Recreation and Facilities Department will serve 3,395 individuals in Census Tract 2.01 as a result structural improvements to the Santo Community Center. Work included structural repairs, wall reinforcement, wind screen system, flooring replacement, and paint. In addition to functioning as a community center, this facility also operates a daycare and the improvements primarily benefitted this.

The City approved a second Jackson Park activity in PY2025, this one to renovate that aquatic building. Without a pool, the building will be re-purposed to house splash pad equipment and restrooms. This project is underway and expected to be complete in PY2026.

Goal 5) Promote Economic Development and Workforce Opportunities

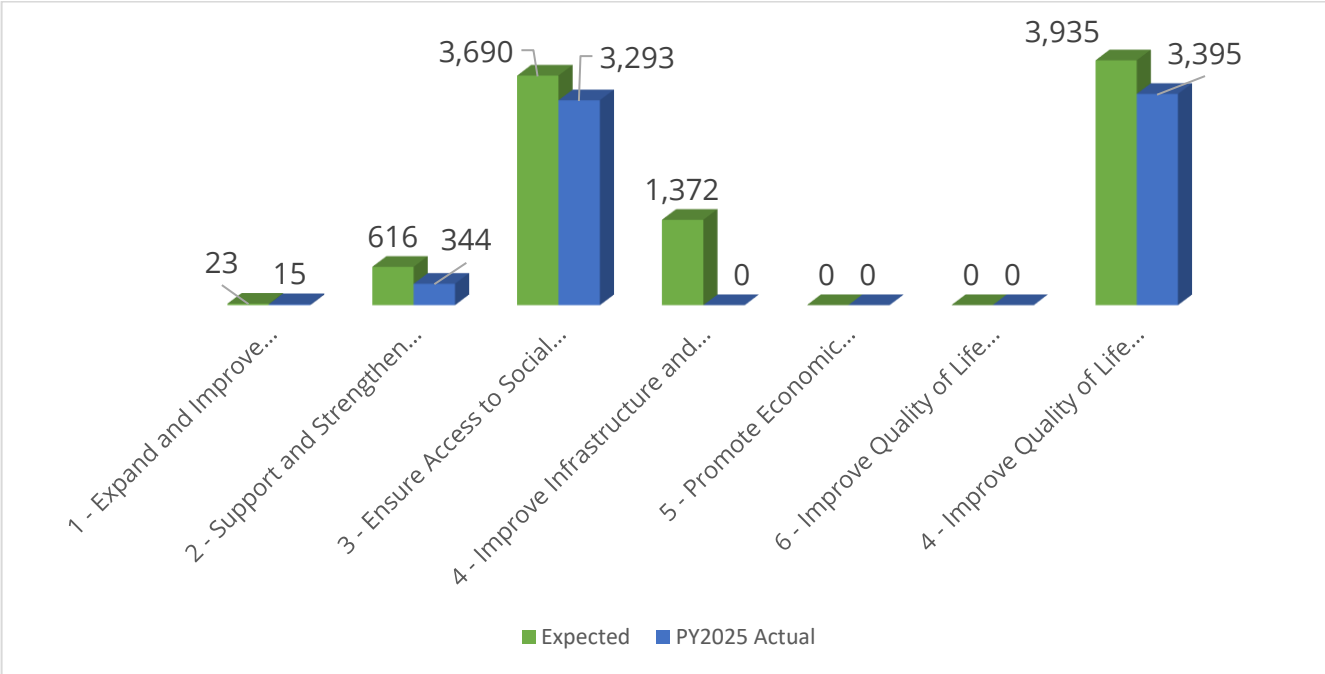
There were no activities in PY2025 for this goal.

Goal 6) Improve Quality of Life Through Neighborhood Revitalization

There were no activities in PY2025 for this goal; however, Habitat for Humanity's Critical Homeowner Repair Program satisfies this goal in addition to the assigned Goal 1.

The City established a new Ordinance Enforcement division in calendar year 2025. Properties identified as blight are referred to Habitat's Critical Homeowner Repair Program.

Graph 1 – Accomplishments 2025/26 Program Year



2025-2029 Goals

- 1 – Expand and Improve Affordable Housing Options
- 2 – Support and Strengthen Homeless Services and Housing
- 3 – Ensure Access to Social Services and Fair Housing
- 4 – Improve Infrastructure and Public Facilities in Low-Income Areas
- 5 – Promote Economic Development and Workforce Opportunities
- 6 – Improve Quality of Life Through Neighborhood Revitalization

2020-2025 Goal with outcomes in PY2025

- 4 – Improve Quality of Life through Neighborhood Revitalization (2024)

***Explanations for Reporting Adjustments**

The City adjusted data to report accomplishments of CDBG activities from years prior to 2025 that expended funding and achieved performance in PY 2025. 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	2,703
Black or African American	104
Asian	21
American Indian or Alaskan Native	72
Native Hawaiian or Other Pacific Islander	27
Total	2,927
Hispanic/Latino	941
Not Hispanic/Latino	2,711

Narrative

The City invested in nonprofit agencies that provide assistance to low- to moderate-income individuals 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 2,927 people were served under the categories listed in Table 3. Among all beneficiaries, 26% were Hispanic/Latino; and 74% not Hispanic/Latino.

This data differs from the PR-23, CDBG and CDBG-CV Summary of Accomplishments. The total number of persons served reported in the PR23, 3,637, is lower than staff calculations, which is 7,047. This is primarily due to activities from prior program years achieving outcomes during PY2025 and those activities are not associated with a current Consolidated Plan goal.

CR-15 - Resources and Investments 91.520(a)

Identify the resources made available

Table 4 – Resources Made Available

Source of Funds	Source	Resources Made Available	Amount Expended During Program Year 2025*
CDBG	Public – Federal	\$1,467,147.92	\$808,211.44
CDBG-CV	Public - Federal	\$131,660.40	\$131,660.40
HOME	Public – Federal	\$354,271	\$14,396.05

**As directed by HUD's IDIS system, the CDBG-CV amounts above are cumulative, reflecting PY 2020, 2021, 2022, 2023, 2024, and 2025.*

Narrative

Resources made available and amounts expended during PY 2025 were calculated through the IDIS reporting system. Amounts were verified during a review of the CDBG Financial Summary Report (PR-26) and program year vouchers reported under Drawdown Report by Voucher Number (PR-07).

Table 5 – Geographic Distribution and Location of Investments

Target Area	Planned Percentage of Allocation	Actual Percentage of Allocation	Narrative Description
Eligible Block Groups	45%	0%	Eligible Census Tract/Block Benefit
Citywide	55%	100%	LMI Individual Benefit

Narrative

The City expended 100% of available CDBG funding for LMI individual benefit. Two related capital improvement activities are underway for Census Tract 2.01 to demolish an aged swimming pool located in a public park and prepare the space for future use by the community. Available capital improvement funding included 65% of the annual entitlement allocation and prior year funding.

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 PY 2025 included foundations, other federal funds, other state/local funds, private contributions, and program fees or dues.

Excluding program administration funds, projects and programs funded by CDBG dollars during the year, whether the project was completed during the year or not, equaled \$4,340,394.23. Among the leverage sources:

- State or local
- Other Federal funds
- Foundations
- Private Contributions
- Program Fees/Dues

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 homelessness, located on City of Medford owned property, adjacent to Medford City Operations Facilities at the corner of North Columbus and West McAndrews Road.

The City also supports the Crossings homeless campground. Crossings is in partnership with Rogue Retreat, the Medford Police Department/Livability Team, and several other community partners. This 3.69 acre site is owned by the City.

To support individuals experiencing homelessness, City Council approved an operations and real property use agreement with Rogue Retreat for the operations of the city-owned Medford Navigation Center/Kelly Shelter on Market Street.

In the 2025-2027 biennium, \$692,100 dollars in total General Fund Grant (GFG) leverage was provided to support 12 essential safety net programs.

Table 6 – Fiscal Year Summary - HOME Match

Excess match from prior Federal fiscal year	\$0
Match contributed during current Federal fiscal year	\$0
Total match available for current Federal fiscal year	\$0
Match liability for current Federal fiscal year	\$0
Excess match carried over to next Federal fiscal year	\$0

Table 7 - Match Contribution for the Federal Fiscal Year

Project No. or Other ID	N/A
Date of Contribution (mm/dd/yyyy)	N/A
Cash (non-Federal sources)	N/A
Foregone Taxes, Fees, Charges	N/A
Appraised Land/Real Property	N/A
Required Infrastructure	N/A
Site Preparation, Construction Materials, Donated labor	N/A
Bond Financing	N/A
Total Match	N/A

HOME MBE/WBE Report

Table 8 - HOME Program Income

Program Income - Enter the program income amounts for the reporting period				
Balance on hand at beginning of reporting period	Amount received during reporting period	Total amount expended during reporting period	Amount expended for TBRA	Balance on hand at end of reporting period
\$0	\$0	\$0	\$0	\$0

Table 9 - Minority Business Enterprises and Women Business Enterprises

Minority Business Enterprises and Women Business Enterprises - Indicate the number and dollar value of contracts for HOME projects completed during the reporting period						
	Total	Minority Business Enterprises				
		Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic	White Non-Hispanic
Contracts						
Number	0					
Dollar Amount	0					
Sub-Contracts						
Number	0					
Dollar Amount	0					
	Total	Women Business Enterprises		Male		
Contracts						
Number	0					
Dollar Amount	0					
Sub-Contracts						
Number	0					
Dollar Amount	0					

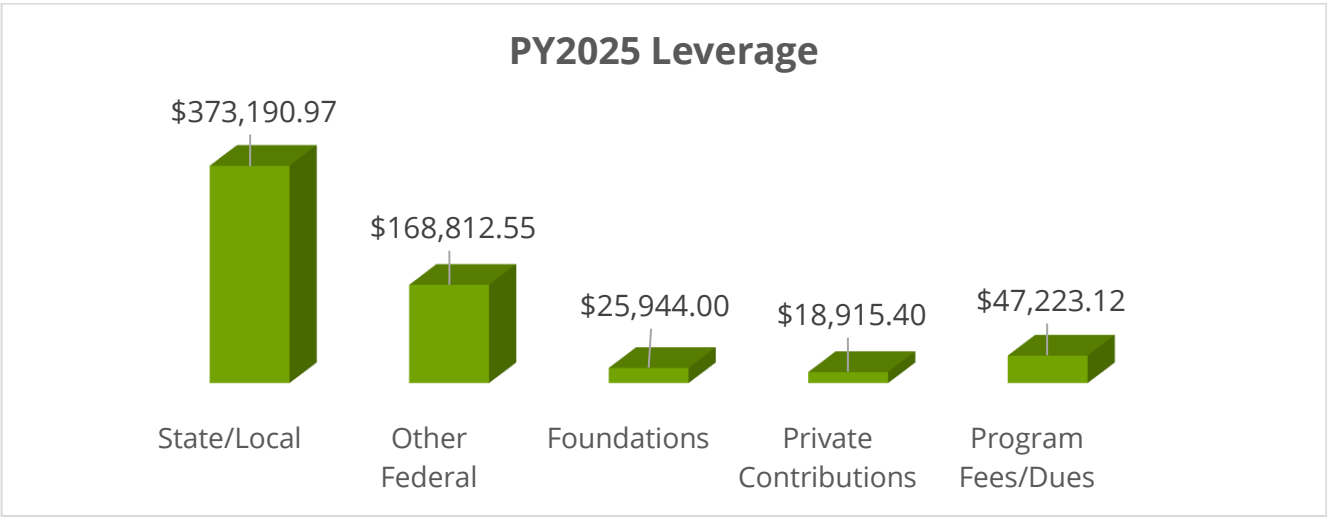
Table 10 - Minority Owners of Rental Property

Minority Owners of Rental Property - Indicate the number of HOME assisted rental property owners and the total amount of HOME funds in these rental properties assisted						
	Total	Minority Property Owners				
		Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic	White Non-Hispanic
Number	0					
Dollar Amount	0					

Table 11 - Relocation and Real Property Acquisition

Relocation and Real Property Acquisition - Indicate the number of persons displaced, the cost of relocation payments, the number of parcels acquired, and the cost of acquisition						
	Number		Cost			
Parcels Acquired						
Businesses Displaced						
Nonprofit Organizations Displaced						
Households Temporarily Relocated, not Displaced						
Households Displaced						
	Total	Minority Business Enterprises				
		Alaskan Native or American Indian	Asian or Pacific Islander	Black Non-Hispanic	Hispanic	White Non-Hispanic
Number	0					
Cost	0					

Graph 2 – Leverage – 2023/24 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 12 – 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	15	2
Number of Special-Needs households to be provided affordable housing units	0	0
Total	15	2

Table 13 – Households Provided Affordable Housing Support

Number of households/persons to be supported	One-Year Goal	Actual
Number of households supported through rental assistance	0	0
Number of households supported through the production of new units	0	0
Number of households supported through rehab of existing units	8	13
Number of households supported through acquisition of existing units	0	0
Total	8	13

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

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

Habitat for Humanity provides home repair to low- to mid-income homeowners. This program experienced delays getting started and work will begin in PY 2025. To-date two homes have received repairs and several more are in the pipeline. Repairs typically include heating systems, windows, insulation, roofing, electrical and plumbing.

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

ACCESS Inc. utilized CDBG funding to renovate 13 low- to moderate income rental units. Renovations included roof replacement, new water heaters, and updated air conditioning units. All work was completed on schedule.

Number of Households Supported Through Rehab of Existing Units

Habitat for Humanity’s Homeowner Repair Program targets low- to moderate income households, focusing on older homes and senior homeowners. Correcting home repair issues will keep homeowners in their home and reduce the risk of becoming homeless.

ACCESS Inc.’s apartment rehabilitation project improved the quality of living environment for low- to moderate-income families.

Discuss how these outcomes will impact future annual action plans.

As barriers are worked through, development associated with the environmental review, procurement processes, and staffing capacity issues is expected to positively impact future annual action plans. The division continues to consult with Camas Consulting for assistance regarding most environmental review processes. In PY2024, City staff implemented a grant management software system 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 14 – Extremely Low- and Low-Income Households Served

Number of Persons Served	CDBG Actual	HOME Actual
Extremely low-income	13	0
Low-income	1	0
Moderate-income	1	0
Total	15	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).

The City seeks to address and prioritize the most vulnerable populations, including persons with disabilities, low-income renter households, and homeless individuals.

In 2023, City Council approved \$200,000 for a Habitat for Humanity project to support infrastructure for eight homes located at 1900 Grandview Avenue. In 2024, another \$378,000 was

approved, bringing the total number of new homes to 13. Infrastructure includes excavation, street, and sidewalk. Homes are being built and sold to low-income qualified people in need of housing.

The ADU SDC Reduction program was designed to further encourage naturally occurring affordable housing by reducing system development charges (SDC). The reduction of fees includes city-assessed SDC fees: Transportation, Sanitary Sewer Collection, Stormwater, and Parks (excluding Sanitary Sewer Treatment). Historically, 8-10 units were produced per year; since this program was implemented, an average of 24 ADU's are produced annually. This program has been extended through June 30, 2027.

In April 2024, Council approved \$1,400,000 through the city's Housing Opportunity Fund which will result in 67 new affordable housing units and eight new transitional beds. These projects are summarized below:

- North Development Group: \$475,000 to acquire property and a city-approved site plan for the development of 36 affordable rental units. Construction is nearly complete and leasing will begin in the near future.
- Proud Ground: \$297,149 to support construction of 18 affordable homes. The property is owned by a land trust and individuals will own the homes. This project will remain affordable in perpetuity. Several units are completed, with more under construction, and home sales are underway.
- Golden Rule ReEntry: \$249,850 to support acquisition of a boarding house-style home. This project will produce eight new transitional housing beds for men previously incarcerated and re-entering society.

In June 2025, Council approved \$200,000 through the city's Housing Opportunity Fund to support the acquisition of a fixer-upper home. The project will produce five new transitional housing beds and a workforce development program for formerly incarcerated women.

Looking ahead, the City is exploring viability of a city-owned lot for development of affordable housing. This lot could potentially produce six to eight units. There is much due diligence to be done and it's anticipated that a determination will be made during PY2026.

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 \$92,334, or 100%, of allowable CDBG public service allocation to four agencies serving homeless persons. Supporting La Clinica, Maslow Project, The Salvation Army, and Center for NonProfit Legal Services, the City helped collectively serve 3,293 individuals.

The City awarded \$130,000 for paving improvements at Crossings, an urban campground. Paving included the driveway and pathways within the campground. Access to this facility is low-barrier and available to homeless persons.

Using CDBG-CV funding, the City supported structural improvements to the Santo Community Center that primarily benefited a day care center that is operated within this facility. Work was completed in PY2025 that included structural repairs, wall reinforcement, wind screen system, flooring, and paint.

Outside of CDBG funding, the City allocated \$692,100 in valuable leverage funding from the City's local General Fund Grant (GFG) program to directly support essential safety net services, with a priority on homeless services and prevention. Seventeen non-profit partners were awarded funding for this two-year program

The City continues to capitalize on a \$23,375 PY 2018 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.

The 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 successfully connect the City's unhoused community to services, and ideally will for years to come.

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

Hearts With A Mission used \$62,304 to complete needed renovations to their transitional living program facility. Repairs included a new roof, heating and cooling system replacement, insulation, and window repairs.

The roadway into Crossings was unpaved and treacherous during rainy weather. CDBG funding provided \$130,000 to pave the roadway and improve access to the campground.

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 Golden Rule ReEntry's Newtown Street project for formerly incarcerated women reentering society. 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.

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.

Four public service agencies collectively expended \$92,334 in CDBG funds, serving 3,293 individuals, targeting LMI individuals and families that were homeless or at risk of experiencing homelessness. Services provided by La Clinica, Maslow Project, Salvation Army, and Center for NonProfit Legal Services were summarized in the previous sections.

In addition, Habitat for Humanity's Homeowner Repair Program mitigated home repair needs, kept people in their homes, and improved quality of life. This program was awarded \$200,000 in CDBG funds to repair 15 homes, with an estimated average cost of \$15,000 per unit.

The GFG program awarded \$692,100 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.

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 PY2025 CDBG funding served homeless persons with outreach, services, and assistance to help transition to permanent housing, as discussed above, collectively serving 3,293 individuals.

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 prioritized 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 created 272 new residential units. This included funding HAJC with \$400,000 to support the development of two projects, totaling 196 units. Construction is complete for each project, with 198 units that primarily serve General Family/Workforce individuals and family households, earning up to 60% Area Median Income (AMI). The Prescott Gardens project is located at the 2100 block of Keene Way Drive and the Orchard Meadows project is located at 1652 and 1634 Orchard Home Drive.

City staff actively consult 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.

The HAJC currently serves 2,530 Housing Choice Vouchers (HCVs), Project-Based Vouchers (PBVs), and Foster Youth to Independence Vouchers; 313 HUD-Veterans Affairs Supportive Housing (HUD-VASH) vouchers; and 16 Homeownership program participants in Jackson County, along with a housing portfolio of 1,789 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 residents residing in HAJC's affordable housing units.

The City prioritizes homeownership in multiple ways through support of Proud Ground and Habitat for Humanity. In addition, this year the City proclaimed April 2026 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 Inc.; 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 continues to be a collaborative, solutions-based community. With Council support and responsiveness to community input, the City's Housing and Community Development Commission's (formerly Housing Advisory Commission) recommendations led to direct and effective policy changes. The following are examples of City actions/ordinances taken to address barriers to affordable housing:

- The City received a \$2,700,000 grant from the Oregon Business Development Department (OBDD) for water and sewer infrastructure improvements for southwest Medford. Work began in PY 2023 and was completed in PY 2025.
- The Crossings (Council Bill 2022-56) – The City's purchase of land resulted in the Urban Campground being relocated to the Crossings, which is a permanent location. This new location provides a homeless campground and transitional housing with tiny homes, permanent showers, bathrooms, and laundry facilities as well as an indoor community space.
- Multiple Unit Property Tax Exemption (MUPTE) and (Council Bill 2022-93) – Council adopted the MUPTE program to provide a tax abatement for housing in a specified geographic area (downtown and surrounding areas) for 600 units over a six-year period.
- Nonprofit Corporation Low Income Housing Property Tax Exemption (NCLIHPTE) (Council Bill 2022-94) – Council adopted the NCLIHPTE program for qualifying properties that support affordable housing for tenants earning 60% or less of Area Median Income (AMI) in the first year and 80% or less of AMI for subsequent years. For the 2026 tax year, 21 affordable housing properties received tax exemption.
- ADU SDC Reduction (Council Bill 2025-49) - To further encourage naturally occurring affordable housing, Council approved the Accessory Dwelling Unit (ADU) Systems Development Charge (SDC) Reduction Program to continue through June 30, 2027. The reduction of fees includes city-assessed SDC fees: Transportation, Sanitary Sewer Collection, Stormwater, and Parks (excluding Sanitary Sewer Treatment). Historically, 8-10 units were produced per year; with this program, an average of 24 units have been completed annually since implementation.

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 which also provides opportunities to connect homeless residents to other services during declared events. ACCESS assumed the primary shelter operator role during the FY2022. This shelter 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.

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

The HCDC also prioritizes the affordable housing needs of underserved residents of Medford and reviews housing policy, economic incentives, and potential partnerships to cultivate affordable housing development for all residents including those that are underserved and homelessness.

The HCDC assists with administering the General Fund Grant (GFG) along with CDBG. In PY2026, City Council approved GFG program funds of \$692,100 for essential safety net services

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)

Medford has a large number of older homes, many of which were constructed before 1978, when the federal ban on lead-based paint was enacted. These older homes, particularly those occupied by low-income families, are at high risk of containing lead-based paint, which can deteriorate over time and create lead dust and paint chips that pose a serious health hazard.

A review of the Oregon Health Authority's Memento Morbi revealed that lead poisoning is not a public health hazard within Jackson County in the last year. This is a monthly surveillance report that tracks communicable and notifiable disease trends and morbidity patterns across the state of Oregon. There were fewer than six cases of lead poisoning or childhood lead poisoning.

The City of Medford works closely with Habitat for Humanity's certified lead abatement staff to conduct lead inspections, risk assessments, and clearance examinations to address housing that has been identified for lead hazard..

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 PY 2025 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 PY 2025 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.

In addition, the City continues to support public service agencies through the GFG. Seventeen agencies supported essential safety net services: ACCESS, Community Works, La Clinica, Rogue Retreat, Rogue Valley Council of Governments' (RVCOG) Food and Friends, Set Free Services, St. Vincent de Paul, The Salvation Army, United Way of Jackson County, Resolve Center for Dispute Resolution, CASA of Oregon, Continuum Behavioral Health & Recovery, Hearts With A Mission, The Family Nurturing Center, Golden Rule ReEntry, Center for NonProfit Legal Services, and Rogue Valley Mentoring.

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 PY 2025 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) Continued to work with Council-appointed advisory bodies, including the HCDC, to impact housing development and address homelessness;

3) 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

5) The City's HCD staff continued to develop expertise in the administration of the CDBG and HOME programs, which has improved capacity to manage a commission and administer 6+ funding sources.

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 and participation by several City staff from Planning, Police, and Legal on the Chronically Homeless Outreach Partnership.

The Housing and Community Development Commission is formed by community members representing the housing authority, a tenant organization, healthcare/social services, local business, workforce development/education, affordable housing, construction and development, and lived experience, along with at-large members. This membership collectively provides insight and expertise to enhance the coordination of services and make funding recommendations.

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 consulted with The Ramsay Group to update the 2025-2029 Analysis of Impediments, identifying seven challenges. Four goals were established that address impediments and promote equitable housing opportunities; the goals align with the 2025-2029 Consolidated Plan.

Goal 1: Increase and Preserve Affordable and Accessible Housing Opportunities: Affordable housing production in Medford has not kept pace with population growth or need. The housing gap is most acute for extremely low-income households, seniors, and persons with disabilities. Nearly 43% of Medford households are cost-burdened, and over 75% of extremely low-income renters face severe housing problems.

Action Step: Leverage CDBG and HOME funding to support the development of 200 new affordable rental units, prioritizing units for households earning less than 30% of AMI and incorporating accessibility features for persons with disabilities.

Goal 2: Reduce Discriminatory Barriers and Expand Fair Housing Outreach Data indicates persistent discrimination based on disability, race, source of income, and familial status. Survey respondents reported low levels of awareness about fair housing rights, particularly among Hispanic and immigrant populations.

Action Step: Partner with the Fair Housing Council of Oregon to conduct four annual fair housing workshops in Medford, including bilingual sessions targeted at Hispanic, immigrant, and voucher-holding households.

Goal 3: Prevent Displacement and Homelessness Among Vulnerable Populations: Medford's housing market pressures, rising rents, and insufficient tenant protections contribute to displacement, especially among Hispanic families, seniors, and ELI households. Homelessness has increased by 35% since 2020.

Action Step: Expand the City's Tenant-Based Rental Assistance (TBRA) program to assist 150 at-risk households annually, focusing on households facing eviction or cost burden exceeding 50% of income.

Goal 4: Strengthen Fair Housing Enforcement and Interagency Collaboration Medford currently lacks a local enforcement agency for fair housing complaints and relies on state and federal entities with limited capacity. Coordination between enforcement agencies and local service providers is fragmented.

Action Step: Establish a Fair Housing Task Force comprised of City staff, service providers, and legal aid organizations to meet quarterly, review fair housing data, and coordinate enforcement and outreach strategies.

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. Records are maintained for a minimum of five years.

Prior to opening a program year application cycle, potential applicants are required to attend an orientation meeting. This virtual meeting reviews program eligibility, program requirements, financial standards, income verification requirements, and reporting and records maintenance requirements.

Staff work closely with individual agencies to ensure efficiency and accuracy. Subrecipients are required to report outcomes on a quarterly basis; it is generally during this process that staff provide technical assistance and guidance to subrecipients. In addition, the recently implemented grant management system will streamline reporting and 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 the Housing and Community Development Division 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. Interpreters for hearing impaired or other accommodations for persons with disabilities can be requested by contacting 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 2025-2029 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 Housing and Community Development Commission (HCDC) holds monthly public meetings to solicit public feedback and formulate recommendations to City Council. Notifications of all public meetings, comment periods, and public hearings associated with the City's CDBG program are advertised in the Grants Pass Daily Courier, 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. CDBG-related documents and records are maintained for a minimum of five years.

Citizen participation pertaining to the 2025/26 CAPER, referred to hereafter as the 2025 CAPER, was facilitated through a mandatory public comment period and two public meetings. The public comment period opened on August 2, 2026, and concluded on September 2, 2026. The Housing and Community Development Commission (HCDC) held a meeting on August 12, 2026. City staff will present the CAPER during these meetings, and if approved, the HCDC will pass a motion recommending the CAPER for approval. City Council will hold a public hearing at Medford City Hall, Council Chambers on Wednesday, September 2, 2026, at 6:00 p.m. to solicit additional feedback and consider the CAPER for approval. Pending Council approval, City Council will then approve Resolution 2026-58 adopting the 2025 CAPER for submission to HUD.

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 PY 2025. Consolidated Plan goals focus on improving and increasing affordable housing, improving access to public services and improving neighborhood conditions.

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

No.

CR-50 - HOME 24 CFR 91.520(d)

Include the results of on-site inspections of affordable rental housing assisted under the program to determine compliance with housing codes and other applicable regulations.

Please list those projects that should have been inspected on-site this program year based upon the schedule in 24 CFR 92.504(d). Indicate which of these were inspected and a summary of issues that were detected during the inspection. For those that were not inspected, please indicate the reason and how you will remedy the situation.

On-site inspections were not required during this program year.

An assessment of the jurisdiction's affirmative marketing actions for HOME units. 91.520(e) and 92.351(a)

HOME funds were not awarded during this program year and there were no affirmative marketing actions.

Data on the amount and use of program income for projects, including the number of projects and owner and tenant characteristics.

Program income was not received during this program year.

Other actions taken to foster and maintain affordable housing. 24 CFR 91.220(k) 24 CFR 91.320(j)

The City has undertaken many programs to assist with the development and maintenance of affordable housing. These programs include HOME, CDBG, Nonprofit Corporation Low-Income Property Tax Exemption, Multiple Unit Property Tax Exemption, SDC Deferral, and Accessory Dwelling Unit System Development Charge Reduction. The City also administers the Housing Opportunity Fund, which is funded by a construction excise tax for affordable housing; this program provides gap financing for affordable housing construction and rehabilitation.

CR-58 – Section 3

Table 15 - Total Labor Hours - Section 3

Total Labor Hours	CDBG	HOME
Total Number of Activities	1	0
Total Labor Hours	0	0
Total Section 3 Worker Hours	0	0
Total Targeted Section 3 Worker Hours	0	0

Table 16 - Qualitative Efforts by Program - Section 3

Qualitative Efforts - Number of Activities by Program:	CDBG	HOME
Outreach efforts to generate job applicants who are Public Housing Targeted Workers	1	0
Outreach efforts to generate job applicants who are Other Funding Targeted Workers	1	0
Direct, on-the job training (including apprenticeships)	0	0
Indirect training such as arranging for, contracting for, or paying tuition for, off-site training	1	0
Technical assistance to help Section 3 workers compete for jobs (e.g., resume assistance, coaching)	0	0
Outreach efforts to identify and secure bids from Section 3 business concerns	1	0
Technical assistance to help Section 3 business concerns understand and bid on contracts	1	0
Division of contracts into smaller jobs to facilitate participation by Section 3 business concerns	1	0
Provided or connected residents with assistance in seeking employment including: drafting resumes, preparing for interviews, finding job opportunities, connecting residents to job placement services	0	0
Held one or more job fairs	0	0
Provided or connected residents with supportive services that can provide direct services or referrals.	0	0
Provided or connected residents with supportive services that provide one or more of the following: work readiness health screenings, interview clothing, uniforms, test fees, transportation	0	0
Assisted residents with finding child care	0	0
Assisted residents to apply for, or attend community college or a four year educational institution	0	0
Assisted residents to apply for, or attend vocational/technical training	0	0
Assisted residents to obtain financial literacy training and/or coaching	0	0
Bonding assistance, guaranties, or other efforts to support viable bids from Section 3 business concerns	0	0

Qualitative Efforts - Number of Activities by Program:	CDBG	HOME
Provided or connected residents with training on computer use or online technologies	0	
Promoting the use of a business registry designed to create opportunities for disadvantaged and small businesses	1	
Outreach, engagement, or referrals with the state one-stop system, as designed in Section 121(e)(2) of the Workforce Innovation and Opportunity Act	0	
Other	0	

Narrative

One CDBG-funded project required compliance with Section 3 during PY 2025.

City of Medford Jackson Park Aquatic Building Renovation

The City of Medford established employment and training benchmarks that subrecipients, contractors and subcontractors should meet to comply with Section 3 requirements on applicable projects as outlined in 24 CFR Part 75.19. An applicable Section 3 Project is any housing rehabilitation, housing construction, and other public construction project that exceeds \$200,000 or more of housing and community development financial assistance from one or more HUD programs. The City of Medford Jackson Park Aquatic Building was determined to be a Section 3 project due to the project receiving more than \$200,000 in total federal financial assistance from the CDBG Program.

Despite efforts to target Section 3 firms and workers, the City and its subcontractors were unable to meet the Section 3 labor hour benchmark requirements for this project.

Since the benchmark hours could not be met, The City of Medford provides a narrative to demonstrate the qualitative efforts that were conducted in an effort to hire Section 3 workers. The primary qualitative efforts that were conducted were:

1. Engaging in outreach efforts to identify and secure bids from Section 3 workers and business concerns.

The City of Medford includes Section 3 preference and contracting requirements in the Request for Proposal, associated bid documents and all construction contracts. The City published the RFP in multiple locations and advertised the project statewide. Unfortunately, due to the scale and complexity of the project, no qualified section 3 business concerns submitted interest to complete the project during the RFP process. Some subcontractors and trade professionals that attended the bid walkthrough indicated that they qualified as minority or women owned, but did not indicate they qualified as a Section 3 Businesses.

2. Divide contracts into smaller jobs where feasible and appropriate to facilitate participation by Section 3 workers and business concerns

Where feasible and appropriate, the City also contracted with smaller firms and divided the project scope into separate activities to facilitate participation by Section 3 workers.

3. Promoted the use of business registries designed to create opportunities for disadvantage and small businesses.

The City utilized the HUD Opportunity Portal until it was discontinued in September 2023 to look for disadvantaged and small businesses that had the potential to qualify as a Section 3 Business.

Despite not meeting the safe harbor labor hour benchmarks, the City of Medford conducted good faith efforts throughout the duration of the project to target and hire works who are disadvantaged, small business, women and minority owned business, and workers who have physical or mental disabilities.

Appendix A – Financial Summary (PR-26)

	Office of Community Planning and Development	DATE: 08-05-26
	U.S. Department of Housing and Urban Development	TIME: 12:47
	Integrated Disbursement and Information System	PAGE: 1
	PR26 - CDBG Financial Summary Report	
	Program Year 2025	
	MEDFORD, OR	

PART I: SUMMARY OF CDBG RESOURCES

01 UNEXPENDED CDBG FUNDS AT END OF PREVIOUS PROGRAM YEAR	851,584.92
02 ENTITLEMENT GRANT	615,563.00
03 SURPLUS URBAN RENEWAL	0.00
04 SECTION 108 GUARANTEED LOAN FUNDS	0.00
05 CURRENT YEAR PROGRAM INCOME	156,513.93
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)	1,623,661.85

PART II: SUMMARY OF CDBG EXPENDITURES

09 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	701,506.22
10 ADJUSTMENT TO COMPUTE TOTAL AMOUNT SUBJECT TO LOW/MOD BENEFIT	0.00
11 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 09 + LINE 10)	701,506.22
12 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	106,705.22
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)	808,211.44
16 UNEXPENDED BALANCE (LINE 08 - LINE 15)	815,450.41

PART III: LOWMOD BENEFIT THIS REPORTING PERIOD

17 EXPENDED FOR LOW/MOD HOUSING IN SPECIAL AREAS	0.00
18 EXPENDED FOR LOW/MOD MULTI-UNIT HOUSING	0.00
19 DISBURSED FOR OTHER LOW/MOD ACTIVITIES	595,342.78
20 ADJUSTMENT TO COMPUTE TOTAL LOW/MOD CREDIT	0.00
21 TOTAL LOW/MOD CREDIT (SUM, LINES 17-20)	595,342.78
22 PERCENT LOW/MOD CREDIT (LINE 21/LINE 11)	84.87%

LOW/MOD BENEFIT FOR MULTI-YEAR CERTIFICATIONS

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

PART IV: PUBLIC SERVICE (PS) CAP CALCULATIONS

27 DISBURSED IN IDIS FOR PUBLIC SERVICES	92,334.00
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)	92,334.00
32 ENTITLEMENT GRANT	615,563.00
33 PRIOR YEAR PROGRAM INCOME	85,469.50
34 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PS CAP	0.00
35 TOTAL SUBJECT TO PS CAP (SUM, LINES 32-34)	701,032.50
36 PERCENT FUNDS OBLIGATED FOR PS ACTIVITIES (LINE 31/LINE 35)	13.17%

PART V: PLANNING AND ADMINISTRATION (PA) CAP

37 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	106,705.22
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)	106,705.22
42 ENTITLEMENT GRANT	615,563.00
43 CURRENT YEAR PROGRAM INCOME	156,513.93
44 ADJUSTMENT TO COMPUTE TOTAL SUBJECT TO PA CAP	0.00
45 TOTAL SUBJECT TO PA CAP (SUM, LINES 42-44)	772,076.93
46 PERCENT FUNDS OBLIGATED FOR PA ACTIVITIES (LINE 41/LINE 45)	13.82%

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

No data returned for this view. This might be because the applied filter excludes all 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
2025	1	508	ACCESS: Birch Corners	14B	LMH	\$106,163.44
Total				14B	Matrix Code 14B	\$106,163.44

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
2025	2	509	7097050	HWAM-Transitional Living Program CIP	03C	LMC	\$1,651.65
2025	2	509	7102880	HWAM-Transitional Living Program CIP	03C	LMC	\$262.08
2025	2	509	7125293	HWAM-Transitional Living Program CIP	03C	LMC	\$30,149.84
2025	2	509	7147934	HWAM-Transitional Living Program CIP	03C	LMC	\$47,655.15
2025	3	510	7097050	Youth 71Five-106 VoTech Campus Housing	03C	LMC	\$423.88
2025	3	510	7102880	Youth 71Five-106 VoTech Campus Housing	03C	LMC	\$617.23
2025	3	510	7125293	Youth 71Five-106 VoTech Campus Housing	03C	LMC	\$3,082.82
2025	3	510	7138768	Youth 71Five-106 VoTech Campus Housing	03C	LMC	\$301.06
2025	3	510	7147934	Youth 71Five-106 VoTech Campus Housing	03C	LMC	\$38.53
2025	3	510	7171373	Youth 71Five-106 VoTech Campus Housing	03C	LMC	\$77.32
2025	3	510	7179567	Youth 71Five-106 VoTech Campus Housing	03C	LMC	\$38.53
					03C	Matrix Code 03C	\$84,298.09
2024	10	501	7097050	CoM Facilities-Santo Community Center Structural Improvements	03E	LMA	\$43,742.07
2024	10	501	7102880	CoM Facilities-Santo Community Center Structural Improvements	03E	LMA	\$5,055.82
2024	10	501	7125293	CoM Facilities-Santo Community Center Structural Improvements	03E	LMA	\$2,883.75
2024	10	501	7138768	CoM Facilities-Santo Community Center Structural Improvements	03E	LMA	\$86.03
2024	10	501	7145776	CoM Facilities-Santo Community Center Structural Improvements	03E	LMA	\$257.20
2024	10	501	7147934	CoM Facilities-Santo Community Center Structural Improvements	03E	LMA	\$16,076.50
					03E	Matrix Code 03E	\$68,101.37
2024	7	495	7058814	CoM Parks-Jackson Pool Demolition & Site Revitalization	03F	LMA	\$1,246.58
2024	7	495	7068815	CoM Parks-Jackson Pool Demolition & Site Revitalization	03F	LMA	\$254.02
2024	7	495	7080100	CoM Parks-Jackson Pool Demolition & Site Revitalization	03F	LMA	\$381.60
2024	7	495	7090539	CoM Parks-Jackson Pool Demolition & Site Revitalization	03F	LMA	\$1,584.00
2024	7	495	7097050	CoM Parks-Jackson Pool Demolition & Site Revitalization	03F	LMA	\$594.15
2024	7	495	7102880	CoM Parks-Jackson Pool Demolition & Site Revitalization	03F	LMA	\$105.34
2024	7	495	7145776	CoM Parks-Jackson Pool Demolition & Site Revitalization	03F	LMA	\$752.88
2024	7	495	7147934	CoM Parks-Jackson Pool Demolition & Site Revitalization	03F	LMA	\$346.81
2024	7	495	7171373	CoM Parks-Jackson Pool Demolition & Site Revitalization	03F	LMA	\$143,528.64
2024	7	495	7179567	CoM Parks-Jackson Pool Demolition & Site Revitalization	03F	LMA	\$5,133.00
2025	4	511	7125293	CoM Parks-Jackson Park Aquatic Building Renovation	03F	LMA	\$3,788.00
2025	4	511	7138768	CoM Parks-Jackson Park Aquatic Building Renovation	03F	LMA	\$926.03
2025	4	511	7145776	CoM Parks-Jackson Park Aquatic Building Renovation	03F	LMA	\$5,565.00
2025	4	511	7147934	CoM Parks-Jackson Park Aquatic Building Renovation	03F	LMA	\$8,611.90
2025	4	511	7179567	CoM Parks-Jackson Park Aquatic Building Renovation	03F	LMA	\$2,055.00
					03F	Matrix Code 03F	\$174,872.95
2024	11	502	7058814	Crossings Paving Improvements	03G	LMC	\$617.80
2024	11	502	7068815	Crossings Paving Improvements	03G	LMC	\$127.02
2024	11	502	7080100	Crossings Paving Improvements	03G	LMC	\$685.74
2024	11	502	7090539	Crossings Paving Improvements	03G	LMC	\$1,498.23
2024	11	502	7097050	Crossings Paving Improvements	03G	LMC	\$593.90
2024	11	502	7102880	Crossings Paving Improvements	03G	LMC	\$10,537.78
2024	11	502	7125293	Crossings Paving Improvements	03G	LMC	\$77.07
2024	11	502	7138768	Crossings Paving Improvements	03G	LMC	\$51,293.34
2024	11	502	7145776	Crossings Paving Improvements	03G	LMC	\$20,030.00
2024	11	502	7147934	Crossings Paving Improvements	03G	LMC	\$38,500.00
					03G	Matrix Code 03G	\$123,960.88
2025	5	503	7147934	Hope House Transitional Living Program	03T	LMC	\$26,062.00
2025	5	503	7179567	Hope House Transitional Living Program	03T	LMC	\$8,688.00
2025	8	506	7145776	Wrap Around Advocacy and Navigation Services for Homeless Youth and Families	03T	LMC	\$15,005.81
2025	8	506	7147934	Wrap Around Advocacy and Navigation Services for Homeless Youth and Families	03T	LMC	\$14,994.19
					03T	Matrix Code 03T	\$64,750.00
2025	6	504	7147934	Building Housing Stabilization and Resiliency	05C	LMC	\$12,000.00
2025	6	504	7179567	Building Housing Stabilization and Resiliency	05C	LMC	\$4,000.00
					05C	Matrix Code 05C	\$16,000.00
2025	7	505	7147934	Medford Health Outreach Services	05M	LMC	\$9,411.32
2025	7	505	7179567	Medford Health Outreach Services	05M	LMC	\$2,172.68
					05M	Matrix Code 05M	\$11,584.00

2024	5	496	7058814	Habitat for Humanity Rogue Valley - Critical Home Repair Program	14A	LMH	\$346.79
2024	5	496	7068815	Habitat for Humanity Rogue Valley - Critical Home Repair Program	14A	LMH	\$1,059.51
2024	5	496	7080100	Habitat for Humanity Rogue Valley - Critical Home Repair Program	14A	LMH	\$1,601.42
2024	5	496	7090539	Habitat for Humanity Rogue Valley - Critical Home Repair Program	14A	LMH	\$470.59
2024	5	496	7097050	Habitat for Humanity Rogue Valley - Critical Home Repair Program	14A	LMH	\$847.53
2024	5	496	7125293	Habitat for Humanity Rogue Valley - Critical Home Repair Program	14A	LMH	\$946.18
2024	5	496	7138768	Habitat for Humanity Rogue Valley - Critical Home Repair Program	14A	LMH	\$344.10
2024	5	496	7145776	Habitat for Humanity Rogue Valley - Critical Home Repair Program	14A	LMH	\$43,963.97
2024	5	496	7147934	Habitat for Humanity Rogue Valley - Critical Home Repair Program	14A	LMH	\$770.72
2024	5	496	7171373	Habitat for Humanity Rogue Valley - Critical Home Repair Program	14A	LMH	\$846.64
2024	5	496	7179567	Habitat for Humanity Rogue Valley - Critical Home Repair Program	14A	LMH	\$578.04
14A Matrix Code 14A							\$51,775.49
Total							\$595,342.78

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

Plan Year	IDIS Project	IDIS Activity	Voucher Number	Activity to prevent	Activity Name	Grant Number	Fund Type	Matrix Code	National Objective	Drawn Amount
2025	5	503	7147934	No	Hope House Transitional Living Program	B25MC410005	EN	03T	LMC	\$28,062.00
2025	5	503	7179567	No	Hope House Transitional Living Program	B25MC410005	EN	03T	LMC	\$8,688.00
2025	8	506	7145776	No	Wrap Around Advocacy and Navigation Services for	B25MC410005	EN	03T	LMC	\$15,005.81
2025	8	506	7147934	No	Wrap Around Advocacy and Navigation Services for	B25MC410005	EN	03T	LMC	\$14,994.19
03T Matrix Code 03T										\$64,750.00
2025	6	504	7147934	No	Building Housing Stabilization and Resiliency	B25MC410005	EN	05C	LMC	\$12,000.00
2025	6	504	7179567	No	Building Housing Stabilization and Resiliency	B25MC410005	EN	05C	LMC	\$4,000.00
05C Matrix Code 05C										\$16,000.00
2025	7	505	7147934	No	Medford Health Outreach Services	B25MC410005	EN	05M	LMC	\$9,411.32
2025	7	505	7179567	No	Medford Health Outreach Services	B25MC410005	EN	05M	LMC	\$2,172.68
05M Matrix Code 05M										\$11,584.00
No Activity to prevent, prepare for, and respond to Coronavirus										\$92,334.00
Total										\$92,334.00

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
2024	9	494	7058814	Program Administration - 2024/25 PY (2024)	21A		\$9,337.65
2024	9	494	7068815	Program Administration - 2024/25 PY (2024)	21A		\$3,152.30
2024	9	494	7080100	Program Administration - 2024/25 PY (2024)	21A		\$78.12
2024	9	494	7145776	Program Administration - 2024/25 PY (2024)	21A		\$500.00
2025	9	507	7080100	Program Administration - 2025/26 PY (2025)	21A		\$10,688.73
2025	9	507	7090539	Program Administration - 2025/26 PY (2025)	21A		\$6,236.72
2025	9	507	7097050	Program Administration - 2025/26 PY (2025)	21A		\$12,230.39
2025	9	507	7102880	Program Administration - 2025/26 PY (2025)	21A		\$7,320.25
2025	9	507	7125293	Program Administration - 2025/26 PY (2025)	21A		\$9,906.91
2025	9	507	7138768	Program Administration - 2025/26 PY (2025)	21A		\$7,373.86
2025	9	507	7145776	Program Administration - 2025/26 PY (2025)	21A		\$11,908.16
2025	9	507	7147934	Program Administration - 2025/26 PY (2025)	21A		\$4,645.13
2025	9	507	7171373	Program Administration - 2025/26 PY (2025)	21A		\$15,550.20
2025	9	507	7179567	Program Administration - 2025/26 PY (2025)	21A		\$7,716.80
21A Matrix Code 21A							\$106,705.22
Total							\$106,705.22

	Office of Community Planning and Development	DATE:	07-30-26
	U.S. Department of Housing and Urban Development	TIME:	14:45
	Integrated Disbursement and Information System	PAGE:	1
	PR26 - CDBG-CV Financial Summary Report		
	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 CDBG-CV FUNDS AWARDED	958,225.00

PART II: SUMMARY OF CDBG-CV EXPENDITURES

05 DISBURSEMENTS OTHER THAN SECTION 108 REPAYMENTS AND PLANNING/ADMINISTRATION	865,100.97
06 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	93,124.03
07 DISBURSED IN IDIS FOR SECTION 108 REPAYMENTS	0.00
08 TOTAL EXPENDITURES (SUM, LINES 05 - 07)	958,225.00
09 UNEXPENDED BALANCE (LINE 04 - LINE8)	0.00

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	865,100.97
13 TOTAL LOW/MOD CREDIT (SUM, LINES 10 - 12)	865,100.97
14 AMOUNT SUBJECT TO LOW/MOD BENEFIT (LINE 05)	865,100.97
15 PERCENT LOW/MOD CREDIT (LINE 13/LINE 14)	100.00%

PART IV: PUBLIC SERVICE (PS) CALCULATIONS

16 DISBURSED IN IDIS FOR PUBLIC SERVICES	589,517.95
17 CDBG-CV GRANT	958,225.00
18 PERCENT OF FUNDS DISBURSED FOR PS ACTIVITIES (LINE 16/LINE 17)	61.52%

PART V: PLANNING AND ADMINISTRATION (PA) CAP

19 DISBURSED IN IDIS FOR PLANNING/ADMINISTRATION	93,124.03
20 CDBG-CV GRANT	958,225.00
21 PERCENT OF FUNDS DISBURSED FOR PA ACTIVITIES (LINE 19/LINE 20)	9.72%

LINE 10 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 10

No data returned for this view. This might be because the applied filter excludes all data.

LINE 11 DETAIL: ACTIVITIES TO CONSIDER IN DETERMINING THE AMOUNT TO ENTER ON LINE 11

No data returned for this view. This might be because the applied filter excludes all 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	05O	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	05O	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		
			6668834	CV3 - Rogue Retreat - Project Turnkey Longer-Term Shelter/Transitional Housing & Operations 2019	03T	LMC	\$5,094.70		
			6674545	CV3 - Rogue Retreat - Project Turnkey Longer-Term Shelter/Transitional Housing & Operations 2019	03T	LMC	\$4,198.87		
			6737666	CV3 - Rogue Retreat - Project Turnkey Longer-Term Shelter/Transitional Housing & Operations 2019	03T	LMC	\$35,228.63		
			6749799	CV3 - Rogue Retreat - Project Turnkey Longer-Term Shelter/Transitional Housing & Operations 2019	03T	LMC	\$1,881.42		
			6781841	CV3 - Rogue Retreat - Project Turnkey Longer-Term Shelter/Transitional Housing & Operations 2019	03T	LMC	\$28,266.04		
			6777404	CV3 - Rogue Retreat - Project Turnkey Longer-Term Shelter/Transitional Housing & Operations 2019	03T	LMC	\$9,375.00		
			6802632	CV3 - Rogue Retreat - Project Turnkey Longer-Term Shelter/Transitional Housing & Operations 2019	03T	LMC	\$22,616.18		
			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		
	6802632	CV - City of Medford - Urban Campground Property Lease			03T	LMC	\$9,600.00		
	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	\$1,477.38
					6668834	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	6737666	CV - La Clinica - Urban Campground Mobile Medical Clinic	05M	LMC	\$8,963.42		
			6749799	CV - La Clinica - Urban Campground Mobile Medical Clinic	05M	LMC	\$224.01		
			6649772	CV - ACCESS - Homeless Outreach Specialist	03T	LMC	\$37.86		
			6668834	CV - ACCESS - Homeless Outreach Specialist	03T	LMC	\$138.09		
			6674665	CV - ACCESS - Homeless Outreach Specialist	03T	LMC	\$29,959.66		
	25	484	6737666	CV - ACCESS - Homeless Outreach Specialist	03T	LMC	\$836.25		
			6894750	CV - City of Medford - Navigation Center Expansion (CARES Act 2019)	03C	LMC	\$34,064.00		
			6903652	CV - City of Medford - Navigation Center Expansion (CARES Act 2019)	03C	LMC	\$15,875.00		
			6925530	CV - City of Medford - Navigation Center Expansion (CARES Act 2019)	03C	LMC	\$27,542.47		
			6986130	CV - City of Medford - Navigation Center Expansion (CARES Act 2019)	03C	LMC	\$66,899.00		
	2024	10	501	7080100	CoM Facilities-Santo Community Center Structural Improvements	03E	LMA	\$14,269.20	
7090539				CoM Facilities-Santo Community Center Structural Improvements	03E	LMA	\$250.00		
7097050				CoM Facilities-Santo Community Center Structural Improvements	03E	LMA	\$116,683.35		
Total							\$865,100.97		

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
			6674645	CV3 - Rogue Retreat - Project Turnkey Longer-Term Shelter/Transitional Housing & Operations 2019	03T	LMC	\$4,198.87
			6737666	CV3 - Rogue Retreat - Project Turnkey Longer-Term Shelter/Transitional Housing & Operations 2019	03T	LMC	\$35,228.63
			6749799	CV3 - Rogue Retreat - Project Turnkey Longer-Term Shelter/Transitional Housing & Operations 2019	03T	LMC	\$1,881.42
			6761841	CV3 - Rogue Retreat - Project Turnkey Longer-Term Shelter/Transitional Housing & Operations 2019	03T	LMC	\$28,266.04
			6777404	CV3 - Rogue Retreat - Project Turnkey Longer-Term Shelter/Transitional Housing & Operations 2019	03T	LMC	\$9,375.00
			6802632	CV3 - Rogue Retreat - Project Turnkey Longer-Term Shelter/Transitional Housing & Operations 2019	03T	LMC	\$22,616.18
			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
			6802632	CV - City of Medford - Urban Campground Property Lease	03T	LMC	\$9,600.00
	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
			6737666	CV - La Clinica - Urban Campground Mobile Medical Clinic	05M	LMC	\$8,963.42
			6749799	CV - La Clinica - Urban Campground Mobile Medical Clinic	05M	LMC	\$224.01
	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
			6737666	CV - ACCESS - Homeless Outreach Specialist	03T	LMC	\$836.25
Total							\$589,517.95

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		\$609.66
			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
			6737666	CV3 - City of Medford CDBG - CV3 General Program Administration	21A		\$19,176.27
			6749799	CV3 - City of Medford CDBG - CV3 General Program Administration	21A		\$731.59
			6777404	CV3 - City of Medford CDBG - CV3 General Program Administration	21A		\$192.14
			6802632	CV3 - City of Medford CDBG - CV3 General Program Administration	21A		\$355.15
			6864750	CV3 - City of Medford CDBG - CV3 General Program Administration	21A		\$5,546.70
			6903652	CV3 - City of Medford CDBG - CV3 General Program Administration	21A		\$1,112.03
			7036358	CV3 - City of Medford CDBG - CV3 General Program Administration	21A		\$85.51
			7080100	CV3 - City of Medford CDBG - CV3 General Program Administration	21A		\$343.69
			7090539	CV3 - City of Medford CDBG - CV3 General Program Administration	21A		\$114.16
Total							\$93,124.03

Appendix B – Resolution 2026-58

RESOLUTION NO. 2026-58

A RESOLUTION adopting the Consolidated Annual Performance Evaluation Report (CAPER) pertaining to Community Development Block Grant (CDBG) and HOME Investment Partnerships (HOME) programs for the 2025/26 program year.

WHEREAS, each year a CAPER is developed and adopted indicating how the activities funded during the program year met the needs identified in the City's Consolidated Plan for Housing and Community Development;

WHEREAS, the City's Consolidated Plan is a comprehensive planning document that identifies the City's overall housing and community development issues and outlining a five-year strategy to address those issues;

WHEREAS, City Council adopted the 2025-2029 Consolidated Plan on June 4, 2025;

WHEREAS, this public hearing is a U.S. Department of Housing and Urban Development (HUD) requirement to solicit citizen input regarding the City's CAPER to use CDBG and HOME funds for the 2025/26 program year and outlines the goals and strategies that have been met during the first of the five consolidated plan program years;

WHEREAS, the City Council must approve the 2025/26 CAPER prior to submitting it to HUD for approval; and

WHEREAS, the City initiated a 30-day public comment period, which ended on September 2, 2026; now, therefore,

BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF MEDFORD, OREGON that the Consolidated Annual Performance and Evaluation Report (CAPER) pertaining to Community Development Block Grant (CDBG) and HOME Investment Partnerships (HOME) funds for the 2025/26 program year, which is on file in the City's Recorders' Office, is hereby adopted.

PASSED by the Council and signed by me in authentication of its passage this 2nd day of September 2026.

ATTEST:


City Recorder


Mayor Michael Zarosinski

APPROVED: September 2, 2026


Mayor Michael Zarosinski

Resolution No. 2026-58

2025/26 CAPER

Appendix C – Affidavit

Grants Pass Daily Courier

P.O. Box 1468, 409 S.E. 7th Street • Grants Pass, Oregon 97528

AFFIDAVIT OF PUBLICATION

State of Oregon)
County of Josephine) ss.

I, Sarah Hannon, being first duly sworn, depose and say that I am a manager of Courier Publishing Co., printer of the Grants Pass Daily Courier, a newspaper of general circulation in Josephine and Jackson Counties in Oregon, as defined by ORS 193.010 and 193.020; printed and published at Grants Pass, in the aforesaid counties and state; that the LEGAL NOTICE, a printed copy of which is herein enclosed, was published in the entire issue of said paper, for one insertion, on the following date:

August 2, 2026.

LEGAL NOTICE

NOTICE OF PUBLIC COMMENT PERIOD AND PUBLIC HEARING

NOTICE IS HEREBY GIVEN that a public comment period for the City of Medford's Consolidated Annual Performance and Evaluation Report (CAPER) for 2025/26 Community Development Block Grant (CDBG) and HOME Investment Partnerships (HOME) program funds will commence on Sunday, August 2, 2026, and close on Wednesday, September 2, 2026. The 2025 CAPER details goals and objectives of the 2025-2029 Consolidated Plan that were accomplished during the program year July 1, 2025, through June 30, 2026. The report includes performance outcomes of public service programs, housing projects, and other development projects eligible under program regulations. The CAPER also reports data associated with beneficiaries, resources and leveraging, affordable housing, homelessness, program monitoring, and other community actions to address the priority needs of low-income and special needs populations.

The purpose of this notice is to solicit citizen input on the CAPER prior to submission to the U.S. Department of Housing and Urban Development (HUD) on or before September 28, 2026. The Medford Housing and Community Development Commission will hold a public meeting on Wednesday, August 12, 2026, at 12:00 p.m. to solicit public comments on the CAPER. This meeting will occur virtually, visit www.medfordoregon.gov for the latest details.

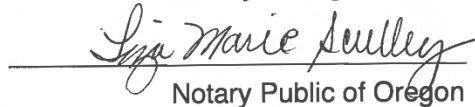
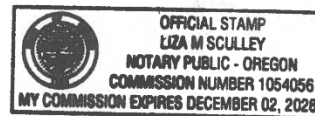
A public hearing will be held on Wednesday, September 2, 2026, at 6:00 p.m., in the City of Medford Council Chambers, located at 411 West 8th Street. Please visit www.medfordoregon.gov for the latest details. The public hearing offers a second opportunity to comment on the CAPER. All comments received will be included as official record in the final CAPER submission to HUD.

Copies of the CAPER are available for public review on the City's website at www.medfordoregon.gov and upon special request. To obtain a copy, submit comments, or for additional information on the hearing, please contact the Housing and Community Development Division at hcd@cityofmedford.org or 541-774-2380. Citizens needing translation services or other special accommodations may contact City staff 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.

No. 00528927 - August 2, 2026



Subscribed and sworn to before me this
fourth day of August, 2026.


Notary Public of Oregon

Appendix D - Public Comments

Two public comments were received and are included in the following pages.

(The remainder of this page is intentionally left blank)



*Rachael Duke, Chair -
Community Partners
for Affordable Housing*

*Kymberly Horner, Vice
Chair - Portland
Community
Reinvestment
Initiatives*

*Kristy Willard,
Treasurer - Housing
Authority of Malheur &
Harney Counties*

*Shannon Tennant,
Secretary - Habitat for
Humanity Oregon*

*Trell Anderson -
Northwest Housing
Alternatives*

*Jessica Blakely -
Salem Housing
Authority*

*Julie Delgado, The
Urban League of
Portland*

*Aubre Dickson -
Community Housing
Fund*

Rita Grady - Polk CDC

*Andrew Heben -
SquareOne Villages*

*Erica Ledesma -
Coalición Fortaleza*

*Dominique
Merriweather - Proud
Ground*

*Erica Mills -
NeighborWorks
Umpqua*

*Margaret Salazar -
Reach CDC*

*Sheila Stiley - NW
Coastal Housing*

September 1, 2026

City of Medford
Housing and Community Development
Medford, Oregon

RE: 2025 Consolidated Annual Performance and Evaluation Report

Dear City of Medford Housing and Community Development Staff,

Housing Oregon appreciates the opportunity to comment on the City of Medford's draft 2025 Consolidated Annual Performance and Evaluation Report.

Housing Oregon is a statewide association representing more than 150 mission-driven organizations working to create, preserve, and operate affordable housing and strengthen communities across Oregon. Our members include nonprofit housing developers, housing authorities, community development corporations, homeownership organizations, financial institutions, service providers, and other partners working in urban, rural, and Tribal communities throughout the state.

We support the City's Goal 1 commitment to **"Expand and Improve Affordable Housing Options."** We also appreciate that the City's broader housing planning framework recognizes both rental and owner-occupied housing as important parts of meeting Medford's affordable housing needs.

We encourage the City to strengthen implementation of Goal 1 by establishing a measurable target for the **production of affordable homeownership units**.

In the draft CAPER, the performance measures reported under Goal 1 focus primarily on housing rehabilitation and housing serving people experiencing homelessness. At the same time, Table 7 identifies "Number of households supported through the production of new units" as a measure, but establishes a one-year goal of zero.

We believe there is an opportunity to better connect the City's stated goal of expanding affordable housing options with measurable housing production outcomes. Affordable homeownership should be part of that work, particularly

Housing Oregon | www.housingoregon.org | P.O. Box 8427, Portland, OR 97207

for lower- and moderate-income households that are increasingly unable to access homeownership through the conventional market.

Housing Oregon encourages the City to:

- Include affordable owner-occupied housing production as a measurable Goal 1 indicator;
- Establish an annual target for the number of affordable homeownership units the City intends to help produce; and
- Report progress toward that target in future Annual Action Plans and CAPERs.

A clear production target would give the City, community partners, and residents a better way to measure progress and would help ensure that affordable homeownership remains part of Medford's long-term housing strategy.

Thank you for the opportunity to comment and for the City's continued work to expand affordable housing options in Medford.

Sincerely,

Kevin Cronin
Director, Policy & Advocacy
Housing Oregon



August 26, 2026

Re: Public Comment on the City of Medford CAPER Report

Dear City of Medford,

Thank you for the opportunity to comment on the city's 2025-26 Consolidated Annual Performance Evaluation Report (CAPER).

Across Oregon, cities are struggling to provide housing opportunities for their residents and respond to state mandates to expand access to housing. We applaud the City of Medford for the thoughtful approach this CAPER takes to address this challenge. Too many families and young adults have given up on the dream of homeownership. Investments by the city help rekindle this dream and make it possible.

With rare exception, cities do not build affordable housing. Cities rely on developers to achieve their affordable housing goals. An effective city-developer partnership is critical to overcoming challenges and achieving success. As Proud Ground's not-for-profit development partner for the New Spirit Village project in Medford, and by extension as one of the city's partners in affordable homeownership development over the last few years, we reviewed the CAPER with great interest.

First, we want to thank the city for investing \$297,149 to help support construction of 18 New Spirit Village affordable homes that are now occupied by new homeowners. These 18 homes are part of the 30 homes we have already constructed and are part of the total project goal of 87 affordable homeownership units. The city's contribution joins contributions from The Thalden Foundation, Oregon Housing and Community Services, Oregon Community Foundation, United Way of Jackson County, and other non-profit social-service organizations is an integral part of the \$30M total project cost. As mentioned in the CAPER, these homes will remain affordable into perpetuity, under Proud Ground's community land trust, enabling current and future Medford individuals and families to build economic security through homeownership.

The vision for New Spirit Village project was born of the 2020 wildfire that devastated Southern Oregon. This project aligns directly with the city's Goal #1 as it provides for the development of affordable owner-occupied housing, inclusive of households below the 80% Area Median Income (AMI) level. While the original focus of the project was to serve

NSV CAPER comments, page 1 of 5

fire-affected families, it has expanded to include first-time homeowners who are priced out of market-rate homes. For several years, we have worked with the city's team – through challenges and celebrations – to advance this shared vision of expanding home ownership opportunities in Medford.

This project has several partners. Proud Ground is the largest and most experienced community land trust organization in the Pacific Northwest; they ensure long term stability for the individuals and families that purchase New Spirit Village homes. ACCESS is the respected provider of vital services and resources in Jackson County; they help individuals and families, including the most vulnerable populations, connect with the New Spirit Village home ownership opportunity.

As a city partner in developing affordable homeownership opportunities, we want to respectfully offer public comments addressing two areas of the CAPER:

1. **CR-05 – Goals and Outcomes** – Goal #1 indicators and targets; and
2. **CR-35 – Other Actions** – reducing barriers to affordable housing.

Public Comment on CR-05

We applaud the City of Medford for making Goal #1 of the 6 CAPER housing goals to be “Expand and Improve Affordable Housing Options.”

In Table 2 of the CAPER, we noted the listed indicators for Goal 1 Affordable Housing only includes housing rehabilitations and housing for homeless. It does not include developing more homes, despite the stated indicator of Goal 1 including development of affordable housing. This objective is called out in Table 7 as “Number of households supported through the production of new units.” However, the city's stated one-year goal is “0” despite the city specifically recognizing this need.

Based on this disconnect between the Goal 1 Indicators and the one-year goal not targeting this recognized need, we recommend the following change:

1. **Include construction of affordable homeownership units as part of the Table 2 city's 2025-2029 Consolidated Plan Goal 1 indicators**, and
2. **Establish a goal of affordable houses to be built per year.** We recommend a goal of at least 15 new houses per year. We have already accomplished that goal for the city for this year, and we can help the city accomplish that goal for the next few years once our project is back on track.

Our rationale for this recommendation is because increasing supply is essential to meet the demand for affordable housing. Housing rehabilitation plays an important role in improving or maintaining the health and safety of a community's housing stock; however, it often does not increase the actual supply of housing. Further, housing development

provides construction jobs that contribute to Goal #5, “Economic Development & Workforce Opportunities,” and Goal #6, “Improve Quality of Life through Neighborhood Revitalization.” Our affordable homeownership development project has completed 30 of 87 homes, with 57 houses to go. And, with an additional investment by the city, New Spirit Village can help the city achieve development goals by developing 20-25 homes per year once the project is back on track.

Public Comment on CR-35

The CAPER addresses other “actions taken to remove or ameliorate the negative effects of public policies that serve as barriers to affordable housing.” As the non-profit developer working on the New Spirit Project, NSV has had the opportunity to work closely with the city for the last few years. The NSV Board is comprised of current and retired professionals who have decades of experience – developing thousands of housing units in large and small communities across the country and providing services to diverse communities facing economic and other barriers in our community.

Based on this experience, we want to contribute to the city’s efforts to make it easier to develop affordable housing in Medford by offering some lessons we learned along the way for the city to consider as part of this CAPER evaluation and report. We want to preface these observations and suggestions with the recognition that city staff have been staunch advocates for city interests and established structures.

Some general observations include:

- With rare exception, cities do not build affordable housing, they rely on developers to help them achieve their affordable housing goals.
- Despite everyone’s best intentions, building affordable housing is challenging.
- If building affordable housing was easy, there would not be a shortage.
- When challenges lead to frustration or roadblocks, it can strain relationships and partnerships, which can harm the goodwill of donors and advocates.
- Limited resources jeopardize the ability to construct affordable housing and the surrounding infrastructure necessary to make it viable.
- Nonprofit organizations, including nonprofit developers, operate at bare minimum levels, with no profit margins.
- When nonprofit organizations face numerous unexpected hurdles, it drives up costs that can make well planned projects no longer viable.
- When projects become overly difficult and partnerships become overly strained, it jeopardizes the ability of housing advocated to accomplish their mission and jeopardizes the city’s ability to accomplish its housing development goals.

Based on our experience, we want to respectfully offer the following suggestions for the city's consideration that we consider helpful practices:

- 1) Establish clear and consistent rules, providing predictability with objective criteria – modifying requirements and processes midstream increases the difficulty of project planning and budgeting. Inconsistent criteria add challenges, as does retroactively establishing requirements that may have been overlooked during previous city review. This includes consistent application of the provisions established in the Municipal Code. Developers want to know the requirements up front, so they can assess whether a project is financially viable and adjust their work accordingly; unexpected change results in added costs or delays, which can kill a project.
- 2) Establish a “one-stop shop” with concurrent rather than sequential reviews and have a lead staff member, such as a Community Development Director, to resolve discrepancies between departments prior to providing direction to a developer – inconsistency in department criteria or priorities is confusing at best and costly at worst. This model works well in other cities as it enables department directors to present their criteria or policies in an internal discussion prior to providing resolved directions to the developer. Having a single point of contact that consolidates staff input and maintains consistency once a decision is reached, provides needed consistency for developers. The city did a good job of this for a brief period by establishing a Community Development Director with authority to serve as the arbiter between departments, and between staff and developer without having to go through a formal appeal process. The city's current single point of contact model has also been helpful.
- 3) Establish service level commitments related to Oregon state required timelines, including publishing, tracking and reporting metrics on such commitments. State law (ORS 227.178) allows a maximum of 30 days for “Application Completion Review” and 100 days (ORS 197A.470) for Final Resolutions for affordable housing projects. Unexpected duration of project reviews adds carrying costs that can destabilize the very thin margin for affordable housing projects, especially for nonprofit developers.
- 4) When appropriate, allow projects that meet established standards and are achieving the city's affordable housing goals to proceed through administrative review than requiring discretionary hearings. While this has been partially addressed through state law, it empowers staff to utilize the discretion provided in the city Code to enable creative solutions to move projects forward, allowing some latitude in recognizing the city's policy goals to build more affordable housing.
- 5) Expand the reduction in SDCs that apply to ADUs to qualifying affordable housing projects. While resources to develop infrastructure are in scarce supply, this policy change can incentivize affordable housing development and offset costs for non-profit organizations seeking to provide such housing and help the city achieve its affordable housing development goals.

6) Establish a “professional cross-training” opportunity for city staff by having them partner with nonprofit developers to better understand the challenges the city’s partners face in developing affordable housing. While staff excel in their respective fields of expertise, the roles of staff and developers are very different. This type of partnership would enable staff to better understand the challenges that developers face, empowering staff to lean into a customer-service mindset that enables them to help developers overcome challenges without compromising city standards. This cross-training will help the city further its affordable housing development goals.

7) Embrace continuous improvement, welcoming feedback on how to address conditions that force potential housing development partners to abandon projects rather than working together to overcome obstacles to enable housing development to move forward. Different perspectives between city staff or policy makers and developer partners that implement the city’s development goals is an opportunity to engage in dialogue to further the city’s long-term goals. When alternative perspectives are only perceived as negative and developers are punished for raising concerns or different perspective, it discourages honest dialogue and can kill projects, which limits the city’s ability to accomplish its long-term goals.

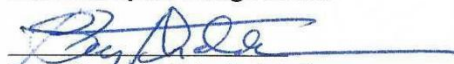
We applaud and embrace the city goal, established in the CAPER, to “address and prioritize the most vulnerable populations.” And we believe the best way to accomplish this goal is to support staff in creating the conditions necessary to facilitate more affordable housing development.

Our recommendations are provided with this shared goal and our aspiration to partner with the city to accomplish the city’s goal of developing more affordable housing.

We can all celebrate the success of building 30 new permanently affordable homes in Medford, and we appreciate the opportunity to participate in the city’s CAPER review process.

Sincerely,

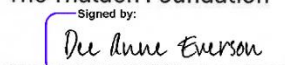
The New Spirit Village Board



Barry Thalden, Principal Officer
The Thalden Foundation

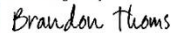


Kathryn Thalden, Trustee
The Thalden Foundation



DeeAnne Everson, Executive Director
United Way of Jackson County

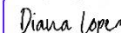
DocuSigned by:



754F1CA325846433...

Brandon Thoms, Director of Programs and
Operations, Habitat for Humanity

Signed by:



48CE5C2D4D744BD...

Diana Lopez, Intake Support Specialist
ACCESS (formerly with UNITE)