

# Council Communication

## April 21, 2015, Business Meeting

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### Public Hearing on the 2015 Community Development Block Grant Award and CDBG Action Plan Development

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**FROM:**

Linda Reid, Housing Program Specialist, Community Development Department, reidl@ashland.or.us

**SUMMARY**

The City of Ashland has received five applications for approximately \$201,718 in competitively available Community Development Block Grant (CDBG) funds. Staff recommends grant awards to St. Vincent DePaul (\$17432), the Maslow Project (\$7,400), Rogue Valley Habitat for Humanity (\$77,886), and Ashland Supportive Housing (\$99,000). At this hearing, the City Council will take public input on the use of federal funds and ultimately the Council will make the final determination regarding the award of the CDBG awards.

**BACKGROUND AND POLICY IMPLICATIONS:**

The City of Ashland is an entitlement jurisdiction and receives a direct allocation of Community Development Block Grant (CDBG) funds from the Department of Housing and Urban Development (HUD). The City of Ashland provides Community Development Block Grant funds to eligible affordable housing providers and non-profit organizations for capital improvement and public service projects within the City of Ashland. The City Council is to evaluate the five proposals requesting CDBG funds. Upon review of the proposals, and after taking any public testimony at a public hearing, the Council shall award funding to the selected applicant(s).

The 2015-16 City of Ashland allocation of CDBG funds is \$165,550. Twenty percent of this allocation (\$33,110) is set aside for administration of the CDBG program. The remaining \$132,440 plus \$69,278 in unallocated grant funds from program year 2014 may be awarded to eligible projects benefiting Ashland's low-income population. The CDBG regulations permit only 15% of the City's annual allocation to be directed toward public service projects. As such only \$24,832 in CDBG funding is available for award to support eligible public service projects during the 2015 program year. All CDBG awards granted must be to eligible projects meeting the CDBG national objectives and which are consistent with the goals identified in the City's [2010-2014 Consolidated Plan](#) for the Use of CDBG funds.

The attached *Staff Evaluation*, dated April 2, 2015, contains a complete background of funding availability, the award process, staff's assessment of each proposal, and the relevant CDBG program criteria relating to the award of CDBG funds and each of the applications received.

**Proposals Received:** The City of Ashland has received five applications for competitive 2015 CDBG funds. The applications received are attached and include the following:



- **St. Vincent De Paul (SVDP)-\$25,500** requested to fund emergency rent and deposit assistance for qualified low income households in an effort to prevent homelessness.
- **Maslow P roject-\$10,000** requested for outreach and case management for homeless youth enrolled in the Ashland school district.
- **Ashland Supportive Housing-\$99,000** requested to improve ADA access and energy efficiency of a housing unit serving five adults with disabilities.
- **Habitat for Humanity Rogue Valley-\$80,000** requested to complete rehabilitation and/or repairs to homes occupied by qualified low-income households and households with ADA accessibility focus.
- **Options for Homeless Residents of Ashland-\$260,000** requested over a two year period to acquire the building that they now occupy to ensure a location for the future and expand services to include an overnight shelter and employment support program as well as to expand the resource center services that OHRA currently offers. Total purchase price of the building is \$850,000.

A total of \$201,828 in CDBG funds is available to distribute to eligible recipients for projects meeting the CDBG national objectives, and which are consistent with the City of Ashland 2010-2014 Consolidated Plan. The maximum allocation allowable to be used to support public service activities is limited to \$24,832.

CDBG funds will be available upon HUD's approval of the 2015 Action Plan, and upon the completion of any regulatory requirements including but not limited to environmental review clearance. Upon completion of the Action Plan a public hearing for review and approval will be held by the Housing and Human Services Commission to ensure consistency with the awards designated by the City Council. HUD must review the annual Action Plan submitted by the City to ensure the activities funded are consistent with federal requirements, and with Ashland's Consolidated Plan.

The Housing and Human Services Commission reviewed the CDBG applications at its regular meeting on April 2. The commission forwarded a recommendation to the Council which differs from staff's recommendations. Both recommendations are provided in the recommendations section below. Staff's evaluation criteria are detailed more fully in the attached evaluation. Primarily staff's recommendations are based on evaluation of CDBG eligibility; the City's five year Consolidated Plan Goals, and applicant's readiness to proceed, more so this year due to the City's need to expend funds in a timely manner according to HUD's guidelines for the CDBG program.

#### HUD Timeliness Rule

The CDBG program has a stipulation that grant administrators plan for the timely expenditure of funds. This is called timeliness, timeliness refers to how quickly the grantee is able to commit and expend CDBG funding. The program rule for timeliness is that the grantee cannot have more than 1.5 times their annual allocation and any other funds sitting in their line of credit at the U.S. treasury. The analysis for timeliness is calculated 60 days prior to the end of the grantees program year (which is July 1<sup>st</sup> for the City of Ashland.) If a grantee has more than 1.5 times their allocation in their line of credit they will be required to submit a "work out plan" to HUD to explain how the money will be utilized to avoid chronic timeliness issues. A grantee that shows chronic timeliness issues is at risk of having HUD withhold future grants until the grantee can expend existing resources. Due to the City's small allocation, the City reaches the 1.5 timeliness threshold more quickly than most grantees.



Should the City award a substantial portion of the current allocation to any applicant that is unable to expend the award funds within the program year the City will be at risk of hitting the timeliness threshold for two consecutive program years. Staff is concerned that in the event a grant award in excess of \$50,000 is awarded to OHRA and they are unsuccessful at meeting their fundraising target and completing the acquisition of their building as scheduled, the City would be at risk of losing funding.

Given the current formula allocation the City can have up to \$248,325 in funding in the line of credit without triggering the timeliness rule.

**COUNCIL GOALS SUPPORTED:**

**2. Promote effective citizen communication and engagement.**

2.1 Engage community in conversation about core services, desired service levels and funding mechanisms.

**5. Seek opportunities to enable all citizens to meet basic needs.**

5.2 Support and promote, through policy, programs that make the City affordable to live in.

5.2. a. Pursue affordable housing opportunities, especially workforce housing. Identify specific incentives for developers to build more affordable housing.

5.3 Leverage partnerships with non-profit and private entities to build social equity programming.

**6. Develop supports to enable citizens to age in Ashland**

6.1 Support and augment existing programs.

**7. Keep Ashland a family-friendly community.**

7.1 Support educational and enrichment programs in the community.

7.3 Support land-use plans and policies that encourage family-friendly neighborhoods.

**FISCAL IMPLICATIONS:**

The CDBG program is funded by Federal grants through HUD and no City of Ashland funds will be used for CDBG activities. In addition, 20% of the annual grant award will be made available to cover administrative costs associated with carrying out grant administration and CDBG program requirements.

**STAFF RECOMMENDATION AND REQUESTED ACTION:**

**Staff's recommendation:**

- \$17,432 to St. Vincent De Paul-Home Visitation Program to fund emergency rent assistance for qualified low-income household in an effort to prevent homelessness.
- \$7,400 to Maslow Project for Case Management services.
- \$99,000 to Ashland Supportive Housing for residential home rehabilitation
- \$77,886 to Rogue Valley Habitat for Humanity to offer home rehabilitation and repairs to qualified low income homeowners with the caveat that any funds not expended by the end of the program year (June 30, 2016) be retained and reallocated by the City through a competitive process.
- Staff does not recommend funding the OHRA application in this program year but does recommend that OHRA re-apply in subsequent years when that organization is more “ready to proceed” with the acquisition.



The Housing and Human Services Commission Recommendation:

The HHSC reviewed proposals at their regular meeting held on April 2, 2015 and recommended award of the CDBG funds as follows:

- \$17,432 to the St. Vincent De Paul Home Visitation to fund emergency rent and deposit assistance for qualified low income households in an effort to prevent homelessness.
- \$7,400 to the Maslow Project for case management services.
- \$16,156 to Ashland Supportive Housing to improve ADA access at a group home for five DD residents
- \$60,000 to Habitat for Humanity Rogue Valley to offer home rehabilitation and repairs to qualified low-income homeowners with the stipulation that they expend the funds by March 1, 2016, any funds remaining after that time can be re-allocated.
- \$100,000 in funds to be placed in reserve for OHRA with the stipulation that OHRA secures \$250K in funding to assist with the acquisition by March 1, 2016 or the funds will revert back to the City for reallocation.

The award recommendations from the Housing and Human Services Commission and Staff are not consistent. In consideration of the Housing and Human Services commission's recommendation to award a grant in support of OHRA, and the concerns regarding the timely expenditure of funds, an alternative allocation that the Council may consider could be:

- \$17,432 to the St. Vincent De Paul Home Visitation to fund emergency rent and deposit assistance for qualified low income households in an effort to prevent homelessness.
- \$7,400 to the Maslow Project for case management services.
- \$76,886 to Ashland Supportive Housing upgrades to a group home for five DD residents
- \$50,000 to Habitat for Humanity Rogue Valley to offer home rehabilitation and repairs to qualified low-income homeowners with the stipulation that they meet a benchmark test to provide the City with the opportunity to reallocate the funds should Habitat be unable to expend at least \$30K of the 2015 allocation by March 1, 2016.
- \$50,000 in funds to be placed in reserve for OHRA with the stipulation that the City will re-evaluate that award to make sure that the City is not at risk of losing the funding.

**SUGGESTED MOTION:**

I move to direct staff to draft the 2014 Annual Action Plan for the use of Community Development Block Grant funds reflecting the award of CDBG funding for the 2015-2016 Program year as follows:

- Award \$\_\_\_\_\_ to St. Vincent De Paul-Home Visitation Program.
- Award \$\_\_\_\_\_ to Maslow Project.
- Award \$\_\_\_\_\_ to Ashland Supportive Housing
- Award \$\_\_\_\_\_ to Habitat for Humanity Rogue Valley.
- Draft an reservation letter indicating that \$\_\_\_\_\_ in CDBG funds is placed in reservation to support Options for Homeless Resident's of Ashland's building acquisition with the stipulation that the City has the discretion to re-evaluate that award to determine that the City is not at risk of losing the funding.

**ATTACHMENTS:**

Staff evaluation April 2, 2015

[Maslow Project](#)

[St. Vincent De Paul](#)



[Ashland Supportive Housing](#)

[Habitat for Humanity Rogue Valley](#)

[Options for Homeless Residents of Ashland](#)

[Housing and Human Services Commission Meeting Minutes, April 2, 2015](#)



# Staff Evaluation

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**To:** Ashland Housing and Human Services Commission  
**Title:** Community Development Block Grant (CDBG) 2015 RFP  
**Date:** April 07, 2015  
**Submitted By:** Linda Reid, Housing Program Specialist

The City of Ashland has received five applications for approximately \$201,718 in competitively available Community Development Block Grant (CDBG) funds. The total CDBG allocation to the City of Ashland for the 2015 Program Year is \$165,550. Of this amount 20% is reserved for program administration (or approximately \$33,110). The remaining \$132,440 plus \$69,278 in unallocated grant funds from Program year 2014 may be awarded to eligible projects benefiting Ashland’s low-income population. The total amount of CDBG funds available to award to capital improvement projects in Program year 2015 is \$201,718, up to 15% of the total annual allocation, or approximately \$24,832, is available for award to Public Service activities.

The City of Ashland Housing and Human Services Commission will hold a public hearing on April 2, 2015 to review the grant requests and make a recommendation to forward to the City Council for consideration. The Council will make the final award selections at a public hearing scheduled for April 21, 2015. Staff’s eligibility assessment of each of the proposals received, and recommendations regarding the allocation of the 2015 CDBG funds are provided on the following pages.

## Proposals Received

<b>Organization</b>	<b>Proposed Project</b>	<b>CDBG Funds Requested</b>	<b>Goal</b>	<b>Consolidated Plan Goal # and Rank*</b>
St. Vincent De Paul	Assist low income and at risk Households with emergency funding to prevent homelessness. *Public Service	\$25,500	With CDBG funds provide 25 low income individuals with emergency rent and security deposit assistance to avoid homelessness (320 HH with CDBG and matching funding)	Goals 6.1 Need Rank A Goals 6.2 Need Rank B Goals 8.2 Need Rank B
Maslow Project	Encourage stability, self-sufficiency and school achievement for homeless youth. *Public Service	\$10,000	Provide access to basic needs, information and referral. Provide case management to improve stability to approximately 100	Goal 6.1 Need Rank A



			identified homeless youth ages 0-21.	
Ashland Supportive Housing	Rehabilitation and upgrade of a housing unit serving adults with intellectual and developmental disabilities.	\$99,000	Improve ADA access and energy efficiency of housing unit serving 5 adults with disabilities	Goal 8.1 Need Rank B Goal 8.2 Need Rank B
Habitat for Humanity Rogue Valley	Rehabilitation and/or repairs to homes occupied by qualified low income households and households with ADA accessibility focus *Capital Improvement	\$80,000	Rehabilitation and/or repairs to 15 homes	Goal 3.1 Need Rank B
Options for Homeless Residents of Ashland	OHRA building acquisition for the Ashland Community Resource Center and Ashland Winter Shelters	130,000	Provide shelter and supportive services/resources to approximately 2,775 homeless and at risk low income clients	Goal 6.1 Need Rank A Goal 6.2 Need Rank B Goal 6.3 Need Rank B

### **Funding Requested/Available**

A total of approximately \$201,828 in CDBG funds is expected to be available to distribute to eligible recipients for projects meeting the CDBG national objectives, and which are consistent with the City of Ashland 2010-2014 Consolidated Plan. The maximum allocation allowable to be used to support public services is limited to approximately \$24,832.

These funds will be available upon approval of the 2015 Action Plan, and upon the completion of any regulatory requirements including but not limited to environmental review clearance. Upon completion of the Action Plan a public hearing for review and approval will be held before the Housing and Human Services Commission to insure consistency with the awards designated by the City Council. The US department of Housing and Urban Development (HUD) must review the annual Action Plan submitted by the City to ensure the activities funded are consistent with federal requirements, and with the local Consolidated Plan.

### **Assessment Criterion**

Staff has assessed the proposals to determine whether they meet the Federal CDBG regulations and address the priorities identified within the City of Ashland 2010-2014 Consolidated Plan.

Three areas are evaluated for each proposal regarding compliance with federal regulations.

- Projects must meet the National Objective of the Community Development Block Grant Program.
- All CDBG funded projects must be an “eligible” use under the Community Development Block Grant Program.
- If a project meets all federal requirements and is selected for award, then federal regulations must be met throughout the course of the project.

Some examples of federal regulations which pertain to Community Development Block Grant funded projects are; all projects funded in whole or in part, with CDBG dollars require an environmental review



in accordance with the National Environmental Policy Act (NEPA). Certain construction projects must use federal Davis-Bacon wage rates. Housing involving structures built prior to 1978 must be tested for the presence of Lead Based Paint and if found steps to mitigate Lead Based Paint must be taken. Any project involving the displacement of residents or businesses as a result of the federally funded project are entitled to assistance under the Uniform Relocation Act. Most importantly the beneficiaries from the application of CDBG funds must qualify as eligible populations under the Federal requirements for the CDBG program. Areas of concern are described for each proposal received. The Housing and Human Services Commission and the City Council can only award CDBG funds to projects that can meet all federal requirements and meets an objective as outlined in the City's 2010-2014 Consolidated Plan.

Priorities within the City of Ashland's 2010-2014 Consolidated Plan are given a priority ranking by letter. The rankings of A, B and C are intended to assist in directing CDBG funds to the greatest needs. In cases where there are competing projects for limited funds, the projects(s) that are ranked the highest will be funded.

*A-The City of Ashland plans to use the CDBG funds for projects that meet these needs.*

*B-The City of Ashland may use CDBG for projects that meet these needs.*

*C-The City of Ashland does not plan to use CDBG funds for projects meeting these needs but will consider certifications of consistency for other entities which are applying for federal assistance to meet these needs. Additionally such needs may also be addressed by the City through the allocation of Economic Development and or Social Service Grants from the City General Fund.*

### **Public Service Proposal Evaluation**

#### **Maslow Project-School Based Services for Ashland Homeless Youth**

Staff has reviewed the Maslow Project, School Based Services for Ashland Homeless Youth Proposal to determine whether it meets the Federal CDBG regulations, and if the proposal addresses the priorities within the City of Ashland 2010-2014 Consolidated Plan. Maslow Project requested \$10,000 in Public Service Grant funds to continue to support a case manager in the elementary, middle and high schools, providing outreach to high risk homeless youth and providing them with immediate needs, case management to keep youth engaged in school and promote stability and self-sufficiency for the homeless youth and their families.

- This project proposal qualifies under the Low-Moderate Income (LMI) benefit national objective; homeless populations are a presumed benefit population under the CDBG program.
- Services to homeless and at-risk populations are an eligible use of CDBG funds.
- Maslow's proposal expects to provide services to 100 identified homeless school children currently enrolled in the Ashland School District.
- Maslow Project has proven capacity to administer CDBG grant funds-this would be Maslow's third year of undertaking this activity in Ashland.
- Staff finds that Maslow Project's proposal is consistent with goals number 6 and 6.1 of the City of Ashland's 2010-2014 Consolidated Plan.

**Goal 6: Support services for homelessness prevention and transition. Where possible, give funding priority to services that are part of a comprehensive approach that improves the living conditions of clients. Safety net services that meet basic**





**needs shall only be funded with CDBG dollars if it can be demonstrated that clients receiving those benefits are part of a program that will eventually help them obtain self-sufficiency.**

- **6.1 Provide assistance to non-profit organizations that assist the homeless and those at risk of homelessness, provide transition assistance to the homeless, and help prevent homelessness (A)**

In evaluating the proposal it is evident that the classification of “A” as a priority indicates that this is the highest priority use for the CDBG funds.

*A-The City of Ashland plans to use CDBG funds for projects that meet these needs.*

Staff sees that Maslow Project’s proposal is an eligible use of CDBG funds and is consistent with the City of Ashland Strategies as outlined in the 5 year Consolidated Plan. This activity assists in the prevention of homelessness for low-income households. Maslow has successfully administered this program within the Ashland School District for the past three years; receiving a combined three year award of \$25,132 and assisting 475 homeless or at-risk students. Furthermore, this project meets and exceeds the 10% leverage requirement of the City of Ashland’s CDBG program and leveraging funding from other sources.

### **St. Vincent De Paul-Home Visitation Program**

Staff has reviewed the St. Vincent de Paul (SVDP) program proposal to determine whether it meets the Federal CDBG regulations, and if the proposal addresses the priorities within the City of Ashland 2010-2014 Consolidated plan. St. Vincent’s has requested \$25,500 to assist homeless and at-risk populations in obtaining and maintaining housing.

- This project proposal qualifies under the Low-Moderate Income (LMI) benefit national objective.
- Generally Income payments (payments to an individual or family, which are used to provide basic services such as food, shelter (including payment for rent, mortgage, and/or utilities) or clothing) are ineligible public service activities when such payments are provided as a grant. However, such expenditures are eligible if; the income payments do not exceed three consecutive months; and the payments are made directly to the provider of services on behalf of an individual or family. This project meets those criteria.
- St. Vincent has a proven capacity to administer CDBG grant funding.
- St. Vincent expects to assist approximately 320 households with the granted funds and matching contributions.
- Staff finds that SVDP’s proposal is consistent with goals number 6.1, 6.2 and 8.2 of the City of Ashland’s 2010-2014 Consolidated Plan.

**Goal 6: Support services for homelessness prevention and transition. Where possible, give funding priority to services that are part of a comprehensive approach that improves the living conditions of clients. Safety net services that meet basic needs shall only be funded with CDBG dollars if it can be demonstrated that clients receiving those benefits are part of a program that will eventually help them obtain self-sufficiency.**



- **6.1 Provide assistance to non-profit organizations that assist the homeless and those at risk of homelessness, provide transition assistance to the homeless, and help prevent homelessness (A)**
- **6.3 Support activities that expand service-enriching housing for the homeless and other special needs populations, including increased shelter, transitional and permanent supportive housing resources. (B)**

**Goal 8: To support housing and supportive services for people with special needs. People with special needs include the elderly, the frail elderly, persons with developmental disabilities, persons with physical disabilities, persons with severe mental illness, persons with alcohol or other drug dependencies and persons with HIV/AIDS or related illnesses.**

- **8.2 Provide assistance to non-profit organizations that provide support services to extremely low- and low-income special needs populations. (B)**

In evaluating the proposal it is evident that the classification of “A” as a priority indicates that this is the highest priority use for the CDBG funds.

*A-The City of Ashland plans to use CDBG funds for projects that meet these needs.*

Staff sees that St. Vincent’s proposal is an eligible use of CDBG funds and is consistent with the City of Ashland Strategies as outlined in the 5 year Consolidated Plan. This activity assists in the prevention of homelessness for low-income and special needs households. Further this project meets and exceeds the 10% leverage requirement of the City of Ashland’s CDBG program providing more than double the requested grant funds and leveraging further funds from other sources. The St. Vincent De Paul Home Visitation Program has successfully administered Community Development Block grant funds for the past five years; utilizing \$105,745 in combined funding to assist over one hundred and fifty individuals obtain or maintain suitable housing thus far.

### **Capital Improvement Proposals**

#### **Ashland Supportive Housing-Special Needs Residential Home Remodel**

Staff has reviewed the Ashland Supportive Housing (ASH) proposal to determine whether it meets the Federal CDBG regulations, and if the proposal addresses the priorities within the City of Ashland’s 2010-2014 Consolidated plan. ASH has requested \$99,000 in grant funds to provide rehabilitation and energy efficiency upgrades on a residential group housing unit occupied by five individuals with intellectual and developmental disabilities. This population qualifies under both the presumed benefit population and qualified low-income population.

- This project proposal qualifies under the Low-Moderate Income (LMI) and Presumed benefit national objective.
- Rehabilitation and repair are an eligible use of CDBG Capital Improvement funds.
- This proposal anticipates serving approximately 5 individuals.
- Staff finds that the ASH proposal is consistent with goal number 8 and 8.1 and 8.2 of the City of Ashland’s 2010-2014 Consolidated Plan.



**Goal 8: To support housing and supportive services for people with special needs. People with special needs include the elderly, the frail elderly, persons with developmental disabilities, persons with physical disabilities, persons with severe mental illness, persons with alcohol or other drug dependencies and persons with HIV/AIDS or related illnesses.**

**8.1 Encourage development of transitional and supportive housing for extremely low- and low-income special needs populations (B).**

**8.2 Provide assistance to non-profit organizations that provide support services for extremely low- and low-income special needs populations (B).**

In evaluating the proposal it is evident that the classification of “B” as a priority indicates that this is an activity that the City may use CDBG funds to support.

*B- The City of Ashland may use CDBG for projects that meet these needs.*

Staff sees that ASH proposal is an eligible use of the CDBG funds and is consistent with the City of Ashland Strategies as outlined in the 5 year Consolidated Plan. This activity will assist low-income special needs populations maintain and expand their safety and independence while also assisting ASH to better provide services to their service population. This activity meets and exceeds the 10% leverage requirement of the City of Ashland’s CDBG program. ASH has a proven track record of successful CDBG grant administration as well as the administration of other state and federal grant funds.

**Rogue Valley Habitat for Humanity-A Brush with Kindness/Critical Home Repair**

Staff has reviewed the Rogue Valley Habitat for Humanity (RVHfH) proposal to determine whether it meets the Federal CDBG regulations, and if the proposal addresses the priorities within the City of Ashland’s 2010-2014 Consolidated plan. RVHfH has requested \$80,000 in grant funds to provide rehabilitation and repair loans on units occupied by qualified low-income homeowners with a focus on handicapped accessibility.

- This project proposal qualifies under the Low-Moderate Income (LMI) benefit national objective.
- Rehabilitation and repair are an eligible use of CDBG Capital Improvement funds.
- This proposal anticipates serving approximately 15 households.
- Staff finds that the RVHfH proposal is consistent with goal number 3 and 3.1 of the City of Ashland’s 2010-2014 Consolidated Plan.

**Goal 3: To maintain the existing affordable housing supply. Where possible, give funding priority to those projects that will provide benefits to residents with the lowest incomes. Also, give funding priority to those programs which retain the units as affordable in perpetuity, or recapture the rehabilitation costs for further use in Ashland.**

**3.1 Retain existing affordable housing, rental and ownership, by supporting rehabilitation programs, which recapture the rehabilitation costs for further use in Ashland (B).**



In evaluating the proposal it is evident that the classification of “B” as a priority indicates that this is an activity that the City may use CDBG funds to support.

*B- The City of Ashland may use CDBG for projects that meet these needs.*

Staff sees that RVHfH proposal is an eligible use of the CDBG funds and is consistent with the City of Ashland Strategies as outlined in the 5 year Consolidated Plan. This activity will assist low-income homeowner’s in completing needed home repairs, will improve and maintain the City’s housing stock, and may assist in the beautification of the City’s residential neighborhoods. This activity is expected to leverage private funds and community involvement and donations that meet and exceeds the 10% leverage requirement of the City of Ashland’s CDBG program. RVHfH has a proven track record of successful CDBG grant administration as well as the administration of other state and federal grant funds. Currently RVHfH has expended less than 20% of the 2014 grant funds awarded to them and staff is concerned that RVHfH may not be able to expend the remaining 2014 grant funds as well as another allocation of grant funds in 2015 within HUD’s timeliness.

### **Options for Homeless Residents of Ashland (OHRA)-Building Acquisition**

Staff has reviewed the Options for Homeless Residents of Ashland (OHRA) proposal to determine whether it meets the Federal CDBG regulations, and if the proposal addresses the priorities within the City of Ashland’s 2010-2014 Consolidated plan. OHRA has requested \$260,000 in grant funds over a two year period to purchase the building they now lease to expand their services as a resource center and to add a nightly winter shelter for homeless populations.

- This project proposal qualifies under the Low-Moderate Income (LMI) benefit national objective.
- Building acquisition is an eligible use of CDBG Capital Improvement funds.
- This proposal anticipates serving approximately 2,275 individuals.
- Staff finds that the OHRA’s proposal is consistent with goal number 6 and 6.1, 6.2 and 6.3 of the City of Ashland’s 2010-2014 Consolidated Plan.

**Goal 6: Support services for homelessness prevention and transition. Where possible, give funding priority to services that are part of a comprehensive approach that improves the living conditions of clients. Safety net services, or services that meet basic needs shall only be funded with CDBG dollars if it can be demonstrated that clients receiving those benefits are part of a program that will eventually help them obtain self-sufficiency.**

- 6.1 Provide assistance to non-profit organizations that assist the homeless and those at risk of homelessness, provide transition assistance to the homeless, and help prevent homelessness (A).
- 6.2 Strengthen the capacity of the Jackson County Continuum of Care to plan activities reducing homelessness in the community. (B)
- 6.3 Support activities that expand service-enriched housing for the homeless and other special needs populations, including increased shelter, transitional and permanent supportive housing resources (B).

In evaluating the proposal it is evident that the classification of “A” as a priority indicates that this is an activity that the City may use CDBG funds to support.



*A-The City of Ashland plans to use CDBG funds for projects that meet these needs.*

Staff sees that OHRA proposal is an eligible use of the CDBG funds and is consistent with the City of Ashland Strategies as outlined in the 5 year Consolidated Plan. This activity will assist homeless and at-risk populations with increased shelter options, by expanding and improving the services available to homeless and at-risk population as well as to aid in homeless prevention and transition. This activity is expected to leverage private funds and community involvement and donations that will meet and exceed the 10% leverage requirement of the City of Ashland's CDBG program. Staff has concerns about several aspects of OHRA's application. One concern is OHRA's two year timeline, and the large amount of money to be raised, should OHRA's campaign be unable to raise enough money by June 30, 2016, the City would be at risk for losing the funding dedicated to that activity, similarly, OHRA's application lists a funding source (the Housing Trust Fund) which is not currently available to fund projects, and which when offered will be offered competitively. Lastly, OHRA's application does not take into account potential costs for building and safety modification which would be required by building code to change the use from an office/assembly use to an overnight shelter use, which is a more intensive use.

### **STAFF RECOMMENDATIONS**

Staff recommends award of the 2015-2016 CDBG funds as follows:

- \$17,432 to St. Vincent De Paul-Home Visitation Program to fund emergency rent assistance for qualified low-income household in an effort to prevent homelessness.
- \$7,400 to Maslow Project for Case Management services.
- \$99,000 to Ashland Supportive Housing for residential home rehabilitation
- \$77,886 to Rogue Valley Habitat for Humanity to offer home rehabilitation and repairs to qualified low income homeowners with the caveat that any funds not expended by the end of the program year (June 30, 2016) be retained and reallocated by the City through a competitive process.
- Staff does not recommend funding the OHRA application in this program year but does recommend that OHRA re-apply in subsequent years when that organization is more "ready to proceed" with the acquisition.

Staff's recommendations are based on evaluation of CDBG eligibility, the City's five year Consolidated Plan Goals, and readiness to proceed.

**Public Service Projects:** In examining the two applications for public service funding (SVDP & Maslow) staff found both to be needed activities within the Ashland community that would benefit CDBG eligible populations. Both the SVDP program and the Maslow Project have successful track records of administering federal grant funds, providing counseling services, resource referrals and, in the case of the SVDP Home Visitation program, direct financial assistance to the homeless and those at risk of homelessness. The Maslow project's proposed activity would continue to benefit homeless populations as well but with an emphasis on homeless children enrolled in Ashland schools. Unfortunately the public service cap of 15% of Ashland's annual award precludes awarding both activities the requested amount of funding.

**Capital Projects:** The City received three capital project proposals; Ashland Supportive Housing-Residential Home Remodel, Options for Homeless Residents of Ashland-building acquisition, and Rogue Valley Habitat for Humanity: A Brush with Kindness/Critical Home Repair program. All three



projects qualify as eligible uses of CDBG funds. In evaluation it is evident that while the OHRA proposal has a Consolidated Plan priority ranking of A; *A-The City of Ashland plans to use CDBG funds for projects that meet these needs*, that project is not ready to proceed. Consequently the two activities with priority rankings of “B” are ready to proceed and are able to expend the funds in a timely manner thereby allowing the City to meet its timeliness cap.

### **HUD Timeliness Rule**

The CDBG program has a stipulation that grant administrators plan for the timely expenditure of funds. This is called timeliness, timeliness refers to how quickly the grantee is able to commit and expend CDBG funding. The program rule for timeliness is that the grantee cannot have more than 1.5 times their annual allocation and any other funds sitting in their line of credit at the U.S. treasury. The analysis for timeliness is calculated 60 days prior to the end of the grantees program year (which is July 1<sup>st</sup> for the City of Ashland.) If a grantee has more than 1.5 times their allocation in their line of credit they will be required to submit a “work out plan” to HUD to explain how the money will be utilized to avoid chronic timeliness issues. A grantee that shows chronic timeliness issues is at risk of having HUD withhold future grants until the grantee can expend existing resources. Due to the City’s small allocation, the City reaches the 1.5 timeliness threshold more quickly than most grantees. Should the City Award the majority of the funding to OHRA the City may be at risk of hitting the timeliness threshold for two consecutive program years. The City would be required to draft and submit a work out plan this year, should OHRA not make their fundraising deadline and complete the acquisition of their building as scheduled the City would be at risk of losing the funding.

Unexpended allocated 2014 grant funds (approximate amount)	\$36,881
Unallocated 2014 grant funds	\$69,278
2015 Allocation	<u>\$165,550</u>
	\$271,709

The City can have up to \$248,325 in funding in the line of credit until May 1<sup>st</sup> 2015 at which time the timeliness rule will be triggered. Currently the City has approximately \$39,419 in unexpended grant funds from the prior year, \$69,278 in unallocated funds from the prior year, and an new unallocated grant of \$165,550, to be allocated in April, but not awarded or able to be spent until July 1, 2015. Given these amount total \$271,709.21 the City will be over the timeliness threshold on May 1<sup>st</sup> when the timeliness test is run.

Staff’s evaluation and recommendation is based on prioritizing the use of CDBG funds to projects which are ready to proceed and which can expend the funds in a timely manner.





*A Hand Up, not a Handout!*

## **MASLOW PROJECT NARRATIVE SUMMARY**

Maslow Project is a nonprofit advocacy organization that provides goal-oriented, wrap-around support services to homeless children and teens, ages 0-21, and their families in Jackson County, with a goal of bringing enough stability into their lives so that kids are able to remain in school and complete their secondary educations. We deliver services through three primary venues: in school-based programs throughout Jackson County, at our Medford Resource Center, and through street outreach. Our nationally-recognized program promotes a youth-centered safety-net model, utilizing a “web” of support including: emergency basic needs, family advocacy, case management and mental health counseling, academic and employment support, enrichment opportunities and enhanced access to community resources.

Our program offers three levels of service: **Basic Engagement** - Critical emergency needs and outreach, intended to ensure the safety and stability of youth; Family Advocacy to ensure youth are able to enroll in school, remain in their school of origin, have transportation to school, and have access to the supports they need; **Moderate Engagement** - In-depth case management (both school and Resource Center-based) that helps youth progress toward goals and foster self-sufficiency; and **Intensive Engagement** - Multifaceted, high-intensity support services (e.g.: mental health counseling, enrichment activities, tutoring, harm reduction/life skills workshops), augmenting our case management services.

The wrap-around supports we provide to at-risk and homeless youth and families - who may be couch surfing, living doubled-up with family or friends, or staying in weekly-rate motels – has a strong preventive component, and can **often prevent these vulnerable individuals from ending up on the streets**. In addition, Maslow Project’s emphasis on stabilizing homeless and at-risk youth **so they can focus their attention on staying in school and completing their education** is one of the best ways we can set these youth on a path toward financial stability and sustainability. Please see Section 4 of this application for more details.

We propose a continuation of our partnership with the City of Ashland to support Maslow Project’s Ashland school-based program. Our Ashland Case Manager works with homeless students and their families to ensure stability and school achievement, supporting our mission to offer every homeless child and youth the probability of success and the opportunity for a better life. The total cost of this project is \$32,913. Maslow Project has already secured \$11,413 of this amount. We respectfully request

\$10,000 from the City of Ashland's CDBG program to continue support for this project. Ashland CDBG funds are an essential source of financial support for this program.

**Project Objective:** Promote and support stability, self-sufficiency and school achievement for homeless youth in Ashland.

**Project Outcomes:**

- Identify and provide Basic Engagement Services (basic needs, outreach, information and referrals) to approximately 100 youth.
- Provide Moderate Engagement Services (in-depth case management) to approximately 45 youth throughout the year. 80% of the youth served through Case Management will either remain stable or demonstrate progress toward stability in one or more focus areas on Maslow Project's *Client Self-Sufficiency Scale* (36 youth).
- 95% of Ashland clients providing feedback through Client Surveys will report a satisfactory or above response.





## CITY OF ASHLAND

### 2015 Program Year Community Development Block Grant (CDBG) Application

These completed Sheets shall be included as the first pages on all submittals.

#### I. APPLICANT INFORMATION

**Applicant Organization Name:**

Maslow Project

**Executive Director's Name(s):** Mary Ferrell

**Board Member Names (attach separate sheet):** See attached sheet

**Applicant Mailing Address:**

500 Monroe Street  
Medford, OR 97501

**Applicant Street Address:**

500 Monroe Street  
Medford, OR 97501

IRS Classification: 501(c)3 public charity

Federal Tax ID#: XXXXXXXXXX

Mission Statement: (may be attached)

Maslow Project's mission is to offer every homeless child and youth the probability of success and the opportunity for a better life. We do this by providing resources for basic needs, removing barriers to education and employment, and fostering self-sufficiency in a collaborative and empowering environment.

Total Employees: 12

Total Volunteers: 45+

**II. CONTACT PERSON** (designate a contact person who is familiar with the project)

Name: Mary Ferrell  
Title: Executive Director  
Phone Number: 541-608-6868  
Fax Number: 541-608-6869  
E-mail Address: mary@maslowproject.com

**III. PROJECT INFORMATION SUMMARY**

Project Name or Title:  
School-Based Services for Ashland's Homeless Youth

Expected Completion Date: June 30, 2016  
Requested CDBG Funds: \$10,000  
Organizational Match: \$11,413 – Individual donations  
Funds from Other Sources: \$11,500 –Ashland School District Title 1A and Title X funds  
Total Project Cost: \$32,913

## 2) PROJECT SUMMARY

Please see Narrative Summary on previous page.

## 3) PROPERTY AND PROJECT INFORMATION

N/A

## 4) SERVICES TO BE PROVIDED

**Services to be Provided:** Maslow Project is partnering with the Ashland School District to place a part-time Case Manager in Ashland schools K-12; identifying homeless youth in need of basic needs and supportive services.

Our Case Manager provides the following levels of Maslow support services to homeless youth in Ashland:

- **Basic Engagement:** Maslow's school-based Case Manager serves as a "one-stop" point of contact for homeless Ashland youth who need access to basic needs, and provides referrals designed to increase immediate connections to supportive services within the community, including: hot meals, food boxes, clothing, hygiene supplies, sleeping bags, bus tokens, and emergency assistance. On- and off-site partnerships with a host of community agencies and organizations also help to create a "safety net" that decreases the possibility of youth getting lost in the system. These services form a stable foundation for youth to build upon in their efforts to remain in school and move toward financial stability and self-sufficiency.
- **Moderate Engagement:** Our Case Manager helps identify and advocate for high-risk and homeless Ashland youth in need of basic needs and support services: acting as a liaison between youth, agencies, schools, and parents; tracking relevant academic and attendance information; and providing support and mentorship to homeless youth and their families. The Case Manager also works with each youth to identify personal goals and plot a course that will help them achieve those goals.
- **Intensive Engagement:** Maslow's Ashland Case Manager also connects kids with positive youth development activities – including access to after-school and summer programs; promoting self-sufficiency through encouraging engagement in school, employment, and supportive services while facilitating increased interpersonal skills. This comprehensive approach helps stabilize youth, keeps them engaged in school and connected to resources, builds resiliency and coping skills, and empowers them to work toward their educational goals and independence.

The services provided through this program align with Goal 6.1 of the City of Ashland's Consolidated Plan.

**Eligible Target Population:** The population served through Maslow Project's Ashland program consists of youth between the ages of 0-21 (and their families)

residing in Ashland and meeting the McKinney-Vento definition of homelessness, who are eligible for public school enrollment or Head Start programs. Homelessness is defined by the McKinney-Vento Act as “any student who lacks a fixed, regular, and adequate night time residence.” This includes couch surfing, doubled-up, living in weekly rate motels, shelters, parks, streets, and campgrounds, or in substandard blight conditions. Children may be unaccompanied or with their parents/guardians. Homeless youth participating in this program are identified in several ways: at point of enrollment in school, by school staff throughout the school year, through self-referral, by Maslow Project outreach staff, and through referrals from partnering agencies.

All youth in this population (target: 100 youth) are presumed by HUD to be low or moderate income. In our experience, 100% of the homeless youth and families we serve fall within the “extremely-low income” category, and earn 30% or less of the Area Median Income.

#### **5) WORK PROGRAM & TIMELINE**

The project outlined in this application is an ongoing program, and will be conducted from July 1, 2015 through June 30, 2016. Our Case Manager currently works in Ashland schools two days/week, providing Basic and Moderate Engagement services to eligible youth and families and connecting them to Intensive Engagement opportunities as needed. Please see attached project schedule (Form A) for more details.

#### **6) FINANCIAL INFORMATION**

Payroll is based on 0.6 FTE Case Manager compensation. Payroll tax and benefits are estimated at 22% of total wages. These costs are based on actual payroll reports. Payroll costs are based on agency salary schedules. The amount requested from the Ashland Community Development Block Grant represents a portion of the Case Manager’s salary. All other program costs are covered by other funding sources, including administration and overhead.

#### **7) ELIGIBILITY FOR FEDERAL FUNDING**

The proposed program delivers the following Federally-eligible activities:

- Client Services
  - a. The proposed project is within the Ashland City Limits, and will take place at Ashland public schools.
  - b. Clients are classified as homeless under the McKinney-Vento Act. Homeless people are presumed by HUD to be principally persons of low and moderate incomes. As stated above, all the individuals Maslow Project has worked within Ashland since July 2012 fall into the “Extremely Low Income” category.
  - c. Maslow Project has already secured funding for the project from the following sources: Private individual donations: \$11,413.
  - d. This is a social service application; sections “d”-“i” are not applicable.

## 8) AGENCY'S MISSION AND SERVICE HISTORY

Maslow Project's mission is to offer every homeless child and youth the probability of success and the opportunity for a better life. We do this by providing resources for basic needs, removing barriers to education and employment, and fostering self-sufficiency in a collaborative and empowering environment.

Maslow Project was founded in 2007 in response to the growing critical needs of homeless youth in Medford, Oregon, and received 501(c)(3) non-profit status in 2009. Our organization evolved out of the federally-mandated McKinney-Vento Act, which requires all public school districts to ensure homeless youth have barrier-free school enrollment, transportation to school, and access to their school of origin, regardless of current residence. In July, 2012, Maslow Project began providing basic needs, outreach, case management and enrichment services to homeless Ashland children and teens (aged 0-21), thanks to a \$10,000 grant award from the Ashland CDBG Program. We now provide school-based case management services in four school districts in Jackson County (Medford, Ashland, Phoenix/Talent and Rogue River), and provide basic engagement services to homeless youth and their families throughout Jackson County.

The wrap-around supports Maslow Project provides to at-risk and homeless youth and families - who may be couch surfing, living doubled-up with family or friends, or staying in weekly-rate motels – has a strong preventive component, and can **often prevent these vulnerable individuals from ending up on the streets**, by stabilizing them BEFORE they go into housing crisis. In addition, Maslow Project's emphasis on stabilizing homeless and at-risk youth **so they can focus their attention on staying in school and completing their education** is one of the best ways we can set these youth on a path toward financial stability and sustainability. In fact, **88% of the school-aged, case managed youth we served during our 2013-2014 program year remained enrolled in school all year.**

Maslow Project is the only organization in Jackson County offering comprehensive, wrap-around support services to the full range of homeless children and youth, aged 0-21. One of the primary strengths of our program is **our commitment to working collaboratively with other Jackson County service agencies, schools, businesses, civic organizations, churches, and volunteers** to provide a comprehensive service delivery model to reach homeless youth: in schools, in the community, on the streets, and through inter-agency collaborations and referrals. Every year, over a dozen foundations; more than 200 local churches, civic groups & businesses and over 800 individuals, provide financial and in-kind support for Maslow Project's work with homeless Jackson County youth and families. This strategy is cost-efficient, minimizes overhead, avoids duplication of services, and ensures that our clients are supported by a web of community-based services. Please see the attached list of Maslow Project's Ashland Supporters for more information.

## 9) SELF-SUFFICIENCY

Maslow Project's mission - "to offer every homeless child and youth the probability of success and the opportunity for a better life" - is based upon the concept of **promoting self-sufficiency** amongst homeless youth.

Youth homelessness takes a heavy toll on those it impacts. According to the National Center on Family Homelessness, homeless youth **go hungry at twice the rate** of other youth, are **sick four times more often**, and have **three times the rate of emotional & behavioral problems**. They also have **twice the rate of learning disabilities**, and are **87% more likely to drop out** of school (USDE). These overlapping risk factors combine to create a population that struggles to become self-sufficient. Self-sufficiency is a crucial component of resiliency for homeless children and youth, who are capable of fostering uncommon strength and courage in the face of difficult life circumstances.

Maslow Project addresses both basic needs and wrap-around case management to ensure a comprehensive response to the systemic challenges associated with youth homelessness. Once these challenges are addressed, youth have the ability to focus on their long-term success and self-sufficiency, rather than immediate or short-term basic survival needs and safety.

Maslow Project further contributes to the long-term self-sufficiency of the youth we serve by encouraging them to focus on completing their high school educations, and continuing on to college or vocational training programs. Education completion is a critical tool for youth hoping to escape the cycle of poverty and move toward a brighter, more promising future. According to a 2012 report from the Bureau of Labor Statistics, adults who have received a high school diploma have median weekly earnings that are 41% higher than those who did not receive a diploma. Unfortunately, the **national graduation rate for homeless high school seniors is just 25%**. In contrast, **five out of five (100%) of the homeless Ashland High School seniors** we worked with during our 2013-2014 program year **graduated from high school**.

In addition, Maslow youth who are interested in pursuing their education beyond high school can now access Maslow Project's donor-established Graduate Fund. The fund is available to Maslow Project clients throughout Jackson County who have graduated from high school or earned their GED's, and wish to pursue further education; and can be applied to various academically-related needs, including: SAT test fees, college application fees, bus fare, college textbooks, laptop computers, and course tuition. **Three of our five graduating seniors from last year (60%) are now continuing on to pursue post-secondary educations;** further improving their chances of achieving financial self-sufficiency.

#### **10) BENEFITS TO EXTREMELY-LOW, LOW- AND MODERATE-INCOME INDIVIDUALS**

The population served through this project consists of children between the ages of 0-21 and their families, who reside in Ashland and meet the Federal Education McKinney-Vento definition of homeless, and are eligible for school enrollment.

As noted above, all youth in this population are presumed by HUD to be low or moderate income. In our experience, 100% of homeless youth and families we serve fall within the “extremely low income” category, at 30% or less of the Area Median Income.

The youth served through Maslow Project’s Ashland program (approximately 100 youth during the 2015/2016 school year) will benefit from the following services:

- Provision of basic needs (food, clothing, hygiene supplies, etc)
- Intensive case management:
  - Advocacy
  - School-based McKinney-Vento services
  - Connection to enrichment opportunities
  - Referrals to mental health counseling, DHS, and additional supportive services
  - Risk assessments and individualized goal plans, safety plans, assistance accessing emergency or transitional housing, and assistance with post-secondary educational goals

**11) ENSURING MODERATE-INCOME INDIVIDUALS DO NOT BENEFIT TO THE EXCLUSION OF EXTREMELY-LOW OR LOW-INCOME INDIVIDUALS**

In order to participate in Maslow Project’s program, youth must be identified as homeless under the McKinney-Vento definition of homelessness. Homeless people are presumed by HUD to be principally persons of low and moderate incomes. **Enrolled extremely-low or low-income homeless youth qualifying for services always have priority in our program,** and will be able to access services regardless of the number of qualifying moderate-income individuals.

**12) DEMOLITION OF LOW- AND MODERATE-INCOME HOUSING**

N/A

**13) PROJECT FEASIBILITY**

N/A

**14) IMPACT ON SIGNIFICANT PROPERTIES**

N/A

**15) OTHER MATERIAL**

Please find attached: a letter of support from Ashland High School, Maslow Project’s Board of Directors list, a list of Maslow’s Ashland community supporters and business sponsors, and an Ashland client success story.

**16) CDBG APPLICATION CHECKLIST & OTHER FORMS**

CDBG Application Checklist (see pages 25-26). Attach Forms A, B, & C.

**CITY OF ASHLAND**  
**2015 Program Year**  
**CDBG APPLICATION CHECKLIST**

In order to determine compliance with all applicable HUD regulations and to help to ensure that projects will be eligible for CDBG funding, the City of Ashland will need to address all HUD requirements. The purpose of this checklist is to point out areas where potential problems could arise. Obviously, this is a comprehensive list, which must evaluate a wide array of different kinds of proposals. Therefore, not every item will be applicable to every project. **Please fill it out entirely indicating all items which are not applicable and include it as part of your proposal application.**

<b>A. Applicant's Background</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Is the applicant a legal non-profit organization or unit of government?	X		
2. Do the proposed clients or users of the project meet HUD Income Guidelines (see page 10 for guidelines)?	X		
3. Does applicant have the capability to maintain written income documentation?	X		
4. Has the applicant made a legal or financial commitment to a proposed project?	X		
5. Is the applicant primarily a religious organization?		X	
6. Has the applicant administered a CDBG project previously?	X		
7. Is your agency willing and able to provide all required reports and accountability to the City as required by HUD?	X		
<b>B. Project Location and Land Use Issues</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Has a location for the project been selected?	X		
2. Is the proposed project within the Ashland City limits?	X		
3. Does the proposed project meet local zoning and land use laws?			X
4. Are any land use permits such as a Site Review, partition, annexation or Conditional Use Permit required?			X
5. Have these approvals been obtained?			X
6. Does the project comply with current building code requirements?			X
7. Does the project meet handicapped accessibility requirements?			X
<b>C. Environmental Issues</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>



1. Is the project located in the 100-year floodplain?			X
2. Is a wetland located on the project site?			X
3. Has any environmental contamination been identified on the project site?			X
4. Has asbestos been identified on the project site?			X
5. If project involves an exiting structure, was it built 1978 or earlier? If year built is known, please specify.			X
6. Is the proposed project located on a major arterial or near the railroad?			X
7. Is the proposed project located adjacent to an above ground flammable storage tank?			X
8. Does the proposed project involve a structure that is 50 years or older?			X
9. Will the applicant complete a Phase I environmental review upon receiving a CDBG award?			X
<b>D. Labor Requirements</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Does the project involve construction over \$2,000 in cost?			X
2. Will the project trigger Davis-Bacon wage requirements?			X
3. Will the project trigger BOLI wage requirements?			X
4. Does the project involve over \$18,703 in City awarded grants or contracts?			X
<b>E. Displacement and Relocation</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Will tenants be displaced by the project?			X
2. Will a business be displaced by the project?			X
3. Will housing units be demolished or converted?			X
<b>F. Property Data</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Does the applicant own the property by fee simple title?			X
2. Are taxes on the property current?			X
3. Is insurance current?			X
4. What is the current debt against the property?			X
5. What is the current use of the property?			X
6. Has an appraisal on the property been conducted? If yes, what is the assessed value of the property?			X

**Form A-2**  
**To be completed for Social Service Proposals**

**Social Services Proposals**

Activity	Start Date	Completion Date
<p><b>Outreach:</b>            Our Case Manager and a Maslow Family Advocate connect with students - via community dinners, visiting with community partners (food pantry, Resource Center, medical van) or through street outreach efforts - to ensure we stay in contact with homeless Ashland youth during the summer break.</p>	7/1/2015	8/31/2015
<p><b>School Based Case Management:</b>            Identify homeless students, provide services/referrals/basic needs, track academic data, establish client goals  <u>Target:</u> 100 youth identified  <u>Outcome Goal:</u> (1) 80% of youth served through Case Management will either <u>remain</u> stable or will demonstrate <u>progress</u> toward stability in one or more focus areas of the <i>Youth Self-Sufficiency Outcome Scale</i>- compared to pre-test scores collected at mid-year, (2) 95% of Askland clients providing feedback through Client Surveys will report a satisfactory or above response.</p>	9/1/2015	6/30/2016
<p><b>Collect Outcome Data:</b>            Student are assessed at start of case management, mid-year, and at the end of the school year</p>	9/1/2015	6/30/2016

**Form B-2**  
**To be completed for Social Service Proposals**

**Social Service Proposals**

	<b>Total Cost</b>	<b>CDBG Request</b>	<b>Other Source(s)</b>
<b>Direct Client Services</b>	<b>\$6,000</b>	\$0	\$6,000
Wages (of personnel providing direct client services)	<b>\$23,345</b>	\$10,000	\$13,345
Materials/Supplies	<b>\$500</b>	\$0	\$500
Marketing/Outreach	<b>\$500</b>	\$0	\$500
Program Administration Includes overhead and general staffing necessary to administer the program (accounting, management, grant administration) but that does not provide direct benefits to the client.	<b>\$2,568</b>	<b>CDBG Funds are not available for program administration</b>	\$2,568
<b>Total Project Cost</b>	<b>\$32,913</b>	\$10,000	\$22,913

**Form C**

**SOURCE(S) OF FUNDS FOR OPERATING EXPENSES WORKSHEET**

Completeness of this worksheet establishes the capacity of the organization to sustain the operations of the program(s).

<b>Sources</b>	<b>Secured</b>	<b>Conditional</b> <small>(awarded with conditions)</small>	<b>Tentative</b>	<b>Commitment Date</b>
Federal Grants				
State Grants			\$7,500	<b>6/2015</b>
Local Grants			\$14,000	<b>By summer 2015</b>
Non Governmental Grants				
Donations/Gifts	\$11,413			<b>FY 2014</b>
Applicant Contribution				
Program Income				
Loans				
Other (specify)				
Other (specify)				
<b>TOTAL</b>	<b>\$11,413</b>		<b>\$21,500</b>	<b>\$32,913</b>

Please provide a description the timeline of loan and grant application dates as related to the proposed project. Specifically, for any tentative funding sources please provide application dates, award dates and funding availability dates.

Tentative funds listed above include: \$7,500 – Title X funds, \$4,000 – Ashland School District funds (dependant upon the approval of the ASD annual 2015-2016 budget – these are Title 1A funds) and \$10,000 - Ashland CDBG funds. All other funds have been secured as of the time of this application submission.

**Form D**  
**DISCLOSURE OF INTERESTS**

To assist the City of Ashland in determining whether there may be a potential conflict of interest related to the expenditure of Community Development Block Grant funds we request the following information be provided by applicants:

ORGANIZATION NAME: **Maslow Project**

- Organization is:
1. Corporation ( )
  2. Non-Profit 501C3 (X)
  3. Partnership ( )
  4. Sole Owner ( )
  5. Association ( )
  6. Other ( ) \_\_\_\_\_

**DISCLOSURE QUESTIONS**

If additional space is necessary, please attach a separate sheet.

1. State the names of each "employee" of the City of Ashland having a financial or personal interest in the above mentioned "organization" or project proposed.

Name, Job Title and City Department

**n/a**

2. State the name(s) of any current or prior elected or appointed "official", of the City of Ashland having a potential "financial interest" in the organization or project.

Name/Title

**n/a**

3. Provide the names of each "board member" of the Organization seeking CDBG funding  
Name Board, Commission, or Committee (may be attached as a separate Sheet)

1. Sharilyn Cano, Board President, Executive and Advancement Committees
2. Royal Standley, Vice President, Advancement Committee
3. Roger Stokes, Treasurer, Executive and Finance Committees
4. Paul Robinson, Executive Committee
5. Jamie Hazlett, Advancement Committee
6. Eric Maxwell, Advancement Committee
7. Amy Zarosinski, Finance Committee
8. Anne Mitchell, Program Committee

If the applicant has provided names in question 1 or 2, please provide details regarding any known potential conflicts of interest in an attached narrative.



## MASLOW PROJECT Board of Directors List

**Sharilyn Cano, Board President**  
*Human Resources Director, Medford School District*

2080 Martin Dr.  
Medford, OR 97501  
(541) 734-5460 work  
(541) 951-0530 cell  
[sharilyn.cano@medford.k12.or.us](mailto:sharilyn.cano@medford.k12.or.us)  
Joined in 2010

**Royal Standley, Vice President**  
*Financial Planner, Oregon Pacific Financial Advisors, Inc*

210 W. 8th Street  
Medford, OR 97501  
(541) 772-1116 work  
(541) 531-1138 cell  
[rstandley@opfa.com](mailto:rstandley@opfa.com)  
Joined in 2011

**Roger Stokes, Treasurer**  
*Retired business owner*

314 Medford Heights Lane  
Medford, OR 97504  
(541) 773-9878 home  
(541) 944-4678 cell  
[rwstokes@clearwire.net](mailto:rwstokes@clearwire.net)  
Founding member 2009

**Paul Robinson, Secretary**  
*Retired non-profit and pastor*

11 North Keeneway Drive  
Medford, OR 97504  
(541) 840-5640 cell  
[robinsonpaul2273@yahoo.com](mailto:robinsonpaul2273@yahoo.com)  
Joined in 2010

**Jamie L. Hazlett**  
*Attorney at Law*

910 E. Main Street  
Medford, OR 97504  
(541) 773-3619 work  
(541) 326-1097 cell  
[jamiehazlettesq@gmail.com](mailto:jamiehazlettesq@gmail.com)  
Joined in 2011

**Eric Maxwell**  
*Business Owner*

19 Rossanley Drive  
Medford, OR 97501  
(541) 840-5733 cell  
[pronmain@msn.com](mailto:pronmain@msn.com)  
Joined in 2013

**Anne Mitchell**  
*Retired educator*

908 Pittview Ct.  
Central Point, OR 97502  
(541) 601-0650  
[anneandsteve.mitchell@yahoo.com](mailto:anneandsteve.mitchell@yahoo.com)  
Joined in 2013

**Amy Zarosinski**  
**CPA, KDCC Piels**

640 Superior Ct.  
Medford, OR 97504-6181  
(541) 773-6633  
[azarosinski@kdcoCPA.com](mailto:azarosinski@kdcoCPA.com)  
Joined in 2014

Revised: August 22, 2014

# ASHLAND PUBLIC SCHOOLS

## BOARD OF DIRECTORS

JIM WESTRICK  
EVA SKURATOWICZ  
ERIC STRONG  
DENEICE COVERT ZEVE  
JOHN WILLIAMS



JAY HUMMEL  
Superintendent

GREG LECUYER  
Business Manager

SAMUEL BOGDANOVE  
Director of Student Services

*Inspiring Learning for Life*

February 09, 2015

Mary Ferrell, Executive Director  
Maslow Project  
500 Monroe Street  
Medford, OR 97501

Dear Mary,

As the Director of Student Services for the Ashland School District, I see the benefit on a daily basis that Maslow Project brings to the students and families in our District. Without the support that Maslow Project provides to our homeless youth, many of these students would go unidentified and not receive the wrap-around supports they need to stay in school, work toward their goals, and achieve educational success.

Maslow Project's Case Manager works hard to help Ashland Schools identify these vulnerable students and bring stability into their lives; giving them the ability to attend and thrive in school, develop positive life skills and engage in meaningful opportunities that help build confidence, resilience and promote each student's overall wellness and self-sufficiency.

On behalf of the Ashland School District, I am happy to write this letter in support of Maslow Project's application to the City of Ashland's Community Development Block Grant. I feel that this program has improved the lives of so many families and children; not only helping to meet their immediate needs, but also providing the intensive supports that help students to stay in school and navigate their way to a more successful and optimistic future.

The Ashland School District fully supports our partnership with Maslow Project, and benefits from this partnership on a daily basis.

Sincerely,

A handwritten signature in blue ink, appearing to read "Samuel Bogdanove". The signature is fluid and cursive, written over the printed name and title.

Samuel Bogdanove  
Director of Student Services

## MASLOW PROJECT: ASHLAND SUPPORTERS

Individual: Over 168 individual financial and in-kind donors (\*an additional 38 individual donors in 2013-2014)

Businesses: 45 local Ashland businesses have made donations (financial and in-kind) to Maslow Project since we began offering services in Ashland in July 2012. (\*an additional 15 businesses in 2013-2014)

Outdoor Exposure Photography	Rocky Mountain Chocolate Company
Tot Restaurant	Bloomsbury Books
Hersey Health Care, Inc.	Paddington Station
RVMC (Holly Street)	Ashland Springs Hotel
Joyride Vintage	Oregon Shakespeare Festival
Rare Earth	Papaya
Mystic Treats	Blue Giraffe
Be Cherished Salon	Village Shoes
Rogue Valley Runners	Crown Jewel
Blackstone Audio	Café nomyen
Avant Garb	FlowerTyme on the Plaza
Northwest Nature Shop	Noble Coffee Roasting
Spice & Tea Exchange	Case Coffee Roasters
Brothers	Illahe Studios
Tree House Books	Hospice Unique Boutique
Plaza Inn & Suites	Zagorska Organic Bodycare
Brothers Restaurant	The Hemporium
Siskiyou Chiropractic	Ashland Food Coop
Rogue Valley Cycle Sport	Martolli's
Hill Station	Greenleaf Restaurant
SoundPeace	Zoey's Café
Royce Real Estate	Mihama Teriyaki Grill
TEN Realty Group	

Organizations & Faith-Based Groups: 42 Ashland organizations and faith-based groups collaborate with, or donate to, Maslow Project (an additional 12 partners in 2013-2014).

First Presbyterian Church	Ashland Food Bank
Temple Emek Shalom	Ashland Food Angels
Ashland Artisan Gallery	Ashland School District
OPSIRG	Shine a Light Foundation
Soroptimist International, Ashland	Ashland Artworks
Ashland Rotary	St. Vincent de Paul
Brains and Beer	ACCESS, Inc.
Ashland Photographer's Gallery	ScienceWorks



City of Ashland  
Ashland Family YMCA  
Willow Wind Community Learning  
Center  
RV Unitarian Universalist Fellowship  
SOU Civic Engagement Program  
AAUW  
Mosaic Mentoring Program  
Trinity Episcopal Church  
SOPRIDE  
Mtn View Retirement Community  
Ashley Senior Apartment residents  
Presbyterian Ladies  
Uncle Foods Diner

Ashland HS Theatre  
First United Methodist Church  
AHS Leadership Class  
Helman Elementary students  
La Clinica Mobile Health Van  
Ashland Community Resource Ctr  
AHS Health Center  
AHS Youth Advisory Council  
SART  
Ashland Police Department  
"You Have Options" program  
OHRA (Options for Homeless Residents  
of Ashland  
The Butler Foundation

**MASLOW PROJECT ASHLAND CLIENT SUCCESS STORY**  
**AS TOLD BY CASE MANAGER CHEYENNE NICHOLS**

“Jacob” has been working with Maslow Project since his freshman year of high school. Since we’ve known him, he and his mother have moved around a lot – “doubling up” with a series of friends and family until they found a small, substandard trailer here in Ashland. During that time, Maslow Project was able to ensure that they received food boxes, school clothes and school supplies for Jacob, and hygiene supplies – in order to bring at least a bit of stability into their lives. Jacob struggled in the alternative education program he was placed in at Ashland High School and often reported arguing with his mom. He wanted her to change their living situation; to find something more stable. Eventually Jacob took matters into his own hands, and struck out on his own. It was a rough transition - Jacob even camped out for a while – but he remained enrolled in school throughout this time, and was a frequent visitor to Maslow. Unsurprisingly, given the upheaval in his life, his grades began to slip. But Jacob never gave up hope for a better life.

At the start of his junior year, Jacob came in the Maslow Project office at Ashland High School with new energy and determination – and a goal of enrolling in regular and honors level classes. He wanted to be challenged, and pushed himself to work harder. I worked with him to help him set goals for the things he wanted to achieve, and with that new focus he began to blossom. In his honors level and AP classes, Jacob started to get straight A’s. Today – in his senior year of high school – Jacob has a place of his own, and interns at Thrival Tech LLC, a fuel resource company. Maslow’s Graduate fund helped to pay for his AP fees, and Jacob started applying to colleges. Recently, he was awarded the “Beat the Odds” scholarship, and a full ride to Reed College, starting this fall! His goal is to continue his education and get a Phd in Molecular Biology. It has been such a pleasure working with Jacob, and watching the incredible journey he has taken. I know we can all expect great things from him!



**CITY OF ASHLAND**  
**2015 Program Year Community Development Block Grant (CDBG)**  
**Application**

These completed Sheets shall be included as the first pages on all submittals.

**I. APPLICANT INFORMATION**

**Applicant Organization Name:** Ashland Home Visit Conference, Rogue Valley District Council, St. Vincent de Paul

**Executive Director's Name(s):** Socorro Holloway

**Board Member Names (attach separate sheet)**

**Applicant Mailing Address:** P. O. Box 1663, Medford, OR 97501

**Applicant Street Address:** 2424 N. Pacific Highway, Medford, OR 97501

IRS Classification: 501 © 3

Federal Tax ID#: XXXXXXXXXX

**Mission Statement:**

The Rogue Valley District Council of St. Vincent de Paul is dedicated to providing compassionate support and care to the poor and needy in Jackson County, regardless of race, religion, creed, sex, sexual preference or ethnic origin. Although the Society's name is recognized around the world, each Council is locally organized, funded and staffed. Our Council has no financial connection or obligation to any church and no effort is made to preach, convert or proselytize. St. Vincent's was founded over 100 years ago by a group of Catholic laymen in Paris and we are often thought of as a Catholic organization. While we originated from this Catholic tradition, we are not part of the Catholic Church. We have received funding and in-kind support from several denominations and have volunteers from many faiths.

Our Council was established in 1982 and provides a 48-bed emergency family shelter, hot lunches six days a week, free groceries and social services (counseling, rent, utility and prescription drug payments, help to obtain legal IDs, clothing, home furnishings, camping equipment, etc.) We have a thrift store and warehouse and also provide school supplies, emergency dental care, health screening, hot showers, laundry and other services. We have no paid employees and rely on 300+ volunteers to provide all our services, saving potentially \$500,000 annually. We can assure the City of Ashland that none of its CDBG

funds will be used to pay employee salaries or benefits. All of your funds will be used to help avoid the growth of homelessness, or to assist homeless families to achieve housing and self-sufficiency.

St. Vincent's Rogue Valley Council has eight Conferences or operating divisions. This proposal specifically describes the activities of the Ashland/Talent Home Visit Conference.

Total Employees: Zero      Total Volunteers: 300+

**II. CONTACT PERSON** (designate a contact person who is familiar with the project)

Name: Rich Hansen

Title: Government/Foundation Liaison

Phone Number: (541) 770-6062

Fax Number: (541) 770-6062 (call first)

E-mail Address: richhansen39@charter.net

**III. PROJECT INFORMATION SUMMARY**

Project Name or Title: Decreasing Homelessness in Ashland in 2015

Expected Completion Date: Project is ongoing. Fiscal year is 10/1/15 – 9/30/16

Requested CDBG Funds: \$ 25,500

Organizational Match: \$ 85,000

Funds from Other Sources: \$ 54,500

Total Project Cost: \$ 165,000

#### IV. Project Description

St. Vincent's Ashland/Talent Home Visit Conference has been helping the needy in our area for over 30 years. We call on families at times of financial crisis to address their immediate problems. In many cases, our **primary objective** is to help **avoid the growth of homelessness** by helping clients in danger of losing their homes or apartments. We also help with utility bills, prescription drug costs, food, clothing, transportation and other personal needs. CDBG funds are used to expand rental assistance for Ashland residents only and help them **gain self-sufficiency**. HUD guidelines give us the flexibility to offer up to three months of assistance with rent and/or deposits.

Our team of 15 volunteers responds to calls for help on St. Vincent's Ashland phone line (541-708-5650). The families we see are referred to us by area churches, other non-profits and government agencies. We operate in teams of two, going to clients' homes, campsites or other locations and listen to their stories of financial crisis, observing their living conditions, counseling them on how we and other groups can help them, encouraging them on ways to find permanent jobs and helping them transition from welfare to work. Sixty percent of our clients are Ashland residents and the CDBG funds are only spent on Ashland residents. We ask for proof of income: jobs, child support, public assistance, unemployment, workers compensation, medical coverage, food stamps, Social Security, disability, etc. One hundred percent of our clients are at or below the federal low- and moderate-income poverty levels.

We do not offer clients direct cash assistance, but intervene with landlords, utilities, pharmacies, etc. to discuss payments. In some cases we may fill their car with gas or give them bus tokens, but we never provide direct cash. We collaborate with the Ashland Homeless Taskforce and their efforts to encourage community outreach programs to provide meals, shelter, food and emergency assistance to our area's growing needy population. Some of our volunteers attend evening meals at local churches to reach out to people who might need our services. When clients' bills are larger than our budget guidelines allow, we contact ACCESS, United Way and a number of Ashland religious denominations, including First Baptist, First Congregational United, First Presbyterian, Trinity Episcopal and Our Lady of the Mountain. We have also been collaborating with ACCESS on their Ashland Community Resource Center.

#### V. Good Results

In the fiscal year ending Sept. 30, 2014, St. Vincent's Ashland/Talent Home Visit Team spent \$141,190 helping the needy. During that period we made nearly 800 home visits and assisted over, 1,300 people – about 800 adults and 500 children. All told, we helped 320 families with rental expenses and 330 families with utility bills. We also assisted clients with medical costs, transportation, food, camping equipment, etc.

We spent a total of \$72,265 for rental assistance last year, aiding 320 families. Of this, \$19,234 represented the Ashland CDBG grant. In total, we made over 200 CDBG home visits and numerous phone calls to 21 families that included 28 adults and nine children. Our team focused on homeless families. Of the 21 families we were able to help with CDBG funds, 15 were homeless when we first met them. That included 18 adults and eight children. We worked with some of these homeless families for almost a year to qualify and prepare them to move into housing. During this period we spent about \$6,000 of our funds to help them pay off other debts, provide them with clothing, furniture, etc. We are especially proud that the combination of City of Ashland CDBG funds and St. Vincent's volunteers and funding were able to move these 26 Ashland residents off the streets and into housing.

## **VI. Financial Considerations**

Our proposed 2014-15 budget is \$165,000, up about 30 percent over last year's forecast. Half of this, \$85,000, will come directly from St. Vincent's Rogue Valley Council. The \$25,500 we are requesting in CDBG funds will represent about 15 percent of our total budget, so you will receive close to a 6:1 leverage for your funds.

Last year, on average, when using our own funds, St. Vincent's spent about \$300 per family on rent relief. However, using CDBG funds and applying the HUD formula, we were able to spend about \$915 per family. This clearly shows the power of the CDBG program for bringing families out of homelessness and helping them become more self-sufficient.

We have been serving the poor in Ashland for over 30 years and we hope to continue for as long as our help is needed. We attempt to assist as many people as possible. Our limitations are manpower and money. We currently have 15 volunteers in our local group. We continue to work with other similar organizations in the Ashland community to leverage both our numbers and our financial resources. Our outreach program is ongoing, with no real beginning or end. When the CDBG funds become available in late summer or early fall, we traditionally spend the amount in about six months.

## **VI. National and Local Priorities**

One hundred percent of our clients are at or below HUD's low- and moderate income poverty levels. Our CDBG program's goal is to slow or stop the growth of homelessness in Ashland. There we meet two of the National Objectives of "1. Primarily benefit low and moderate income persons" and "2. Meet a particularly urgent community development need." Similarly, we meet Ashland's Homeless Goal #6 to provide "Support services for homeless prevention and transition." HUD/CDBG Statute 24 CFR 570.201 (e) lists "Public Service Rent Subsidies" as an "eligible" activity. Our Home Visit teams often remain in contact with a client over an extended period to help them over their financial difficulties and transition to self-sufficiency. In 2014-15, we hope to keep at least 250 families from becoming homeless and get back on their feet. The requested \$25,500 in Ashland CDBG funds would help us reach an additional 25 families.

The Jackson County Point-in-Time Homeless Survey estimates there are over 1,000 people in our County without homes. A third of these are children. The survey lists "lack of money to pay rent" as a primary cause of homelessness. Dealing with this growing homeless population has become a key issue in Ashland. St. Vincent's rental assistance program is designed to specifically help alleviate this problem.

We have a 30-year track record of working with the needy here and hope to continue this work for many years. The City of Ashland has enabled St. Vincent's to significantly increase its outreach and we hope this partnership can continue. We provide over half the project costs from internal matching funds and use an all-volunteer staff to provide our services. We believe St. Vincent's presents the City of Ashland with an outstanding way to leverage funds to aid the needy.

**CITY OF ASHLAND**  
**2015 Program Year**  
**CDBG APPLICATION CHECKLIST**

In order to determine compliance with all applicable HUD regulations and to help to ensure that projects will be eligible for CDBG funding, the City of Ashland will need to address all HUD requirements. The purpose of this checklist is to point out areas where potential problems could arise. Obviously, this is a comprehensive list, which must evaluate a wide array of different kinds of proposals. Therefore, not every item will be applicable to every project. **Please fill it out entirely indicating all items which are not applicable and include it as part of your proposal application.**

<b>A. Applicant's Background</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Is the applicant a legal non-profit organization or unit of government?	X		
2. Do the proposed clients or users of the project meet HUD Income Guidelines (see page 10 for guidelines)?	X		
3. Does applicant have the capability to maintain written income documentation?	X		
4. Has the applicant made a legal or financial commitment to a proposed project?	X		
5. Is the applicant primarily a religious organization?		X	
6. Has the applicant administered a CDBG project previously?	X		
7. Is your agency willing and able to provide all required reports and accountability to the City as required by HUD?	X		
<b>B. Project Location and Land Use Issues</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Has a location for the project been selected?			X
2. Is the proposed project within the Ashland City limits?	X		
3. Does the proposed project meet local zoning and land use laws?			X
4. Are any land use permits such as a Site Review, partition, annexation or Conditional Use Permit required?			X
5. Have these approvals been obtained?			X
6. Does the project comply with current building code requirements?			X
7. Does the project meet handicapped accessibility requirements?			X



<b>C. Environmental Issues</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Is the project located in the 100-year floodplain?			X
2. Is a wetland located on the project site?			X
3. Has any environmental contamination been identified on the project site?			X
4. Has asbestos been identified on the project site?			X
5. If project involves an exiting structure, was it built 1978 or earlier? If year built is known, please specify.			X
6. Is the proposed project located on a major arterial or near the railroad?			X
7. Is the proposed project located adjacent to an above ground flammable storage tank?			X
8. Does the proposed project involve a structure that is 50 years or older?			X
9. Will the applicant complete a Phase I environmental review upon receiving a CDBG award?			X
<b>D. Labor Requirements</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Does the project involve construction over \$2,000 in cost?			X
2. Will the project trigger Davis-Bacon wage requirements?			X
3. Will the project trigger BOLI wage requirements?			X
4. Does the project involve over \$18,703 in City awarded grants or contracts?			X
<b>E. Displacement and Relocation</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Will tenants be displaced by the project?			X
2. Will a business be displaced by the project?			X
3. Will housing units be demolished or converted?			X
<b>F. Property Data</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Does the applicant own the property by fee simple title?			X
2. Are taxes on the property current?			X
3. Is insurance current?			X
4. What is the current debt against the property?			X
5. What is the current use of the property?			X
6. Has an appraisal on the property been conducted? If yes, what is the assessed value of the property?			X

**Form A-1  
Form A-2  
To be completed for Social Service Proposals**

**Social Services Proposals**

<b>Activity</b>	<b>Start Date</b>	<b>Completion Date</b>
Provide rental assistance	Ongoing	Ongoing
Apply to US Bank, Avista Foundations for funding	First Quarter, 2015	Third Quarter, 2015
Recruit new volunteers	Ongoing	Ongoing

**Social service providers should list key benchmarks in the table above for their proposed projects (IE hire of personnel, application for further funding, initiation of direct client services, etc)**

**Form B-2  
To be completed for Social Service Proposals**

**Social Service Proposals**

	<b>Total Cost</b>	<b>CDBG Request</b>	<b>Other Source(s)</b>
<b>Direct Client Services</b>	<b>\$162,000</b>	<b>\$25,500</b>	<b>\$136,500</b>
Wages (of personal providing direct client services)			
Materials/Supplies	<b>3,000</b>		3,000
Marketing/Outreach			
Program Administration Includes overhead and general staffing necessary to administer the program (accounting, management, grant administration) but that does not provide direct benefits to the client.		<b>CDBG Funds are not available for program administration</b>	
<b>Total Project Cost</b>	<b>165,000</b>	<b>25,500</b>	139,500

**Form C**

**SOURCE(S) OF FUNDS FOR OPERATING EXPENSES WORKSHEET**

Completeness of this worksheet establishes the capacity of the organization to sustain the operations of the program(s).

<b>Sources</b>	<b>Secured</b>	<b>Conditional</b> <small>(awarded with conditions)</small>	<b>Tentative</b>	<b>Commitment Date</b>
Federal Grants			25,500	<b>3Q, 2015</b>
State Grants				
Local Grants			17,500	<b>3Q, 2015</b>
Non Governmental Grants			5,000	<b>3Q, 2015</b>
Donations/Gifts			32,000	<b>3Q, 2015</b>
Applicant Contribution	<b>85,000</b>			
Program Income				
Loans				
Other (specify)				
Other (specify)				
<b>TOTAL</b>	<b>85,000</b>		<b>80,000</b>	

Please provide a description the timeline of loan and grant application dates as related to the proposed project. Specifically, for any tentative funding sources please provide application dates, award dates and funding availability dates.

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CDBG (\$25,500) application submitted Feb. 2015

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US Bank (\$5,000) application will be submitted in Feb. 2015

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Donations and gifts based on historical averages.

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**Form D**  
**DISCLOSURE OF INTERESTS**

To assist the City of Ashland in determining whether there may be a potential conflict of interest related to the expenditure of Community Development Block Grant funds we request the following information be provided by applicants:

ORGANIZATION NAME:

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Organization is:      1. Corporation ( )  
                             2. Non-Profit 501C3 ( ) XXX  
                             3. Partnership ( )  
                             4. Sole Owner ( )  
                             5. Association ( )  
                             6. Other ( ) \_\_\_\_\_

**DISCLOSURE QUESTIONS**

If additional space is necessary, please attach a separate sheet.

1. State the names of each "employee" of the City of Ashland having a financial or personal interest in the above mentioned "organization" or project proposed.

Name, Job Title and City Department

\_\_\_\_\_ None

2. State the name(s) of any current or prior elected or appointed "official", of the City of Ashland having a potential "financial interest" in the organization or project.

Name/Title

\_\_\_\_\_ None

3. Provide the names of each "board member" of the Organization seeking CDBG funding Name Board, Commission, or Committee (may be attached as a separate Sheet)

See attached.

If the applicant has provided names in question 1 or 2, please provide details regarding any known potential conflicts of interest in an attached narrative.



Options for Homeless Residents  
of Ashland (OHRA)

RECEIVED  
FEB 24 2015  
City Of Ashland

*DATE: February 19, 2015*

*TO: Linda Reid, Housing Program Specialist, Dept. of Community Development*

*FROM: Options for Homeless Residents of Ashland (OHRA)*

*SUBJECT: Application in Response to the City's CDBG 2015 RFP*

*Options for Homeless Residents of Ashland (OHRA) is a 501(c)(3), non-profit organization dedicated to providing the homeless and the low-income residents of Ashland with opportunities to improve their life situations and leave poverty and homelessness behind.*

*In February of 2014 OHRA opened the Ashland Community Resource Center (ACRC), a joint partnership between OHRA and ACCESS. The City of Ashland provided \$100,000 for ACRC operations over two years (2014 and 2015) with the understanding that OHRA would develop additional funding resources by 2016.*

*During our first year of operations we've experienced a total of 3,685 client visits. 600 of these were first time clients (347 homeless and 253 with homes). In total we served 57 veterans, housed 27 families and assisted 14 people in securing employment. Many of these guests often require time intensive services: job search and resume services, housing referral services, case management, personal identity documentation services, mailing, internet access, printing and various personal services (food, clothing, restroom, backpack storage, bus tokens, cold weather gear and etc.)*

*The good news is that the ACRC has been successful beyond all original expectations. Not only are we meeting obvious personal needs, we also are beginning to witness an outpouring of community support. We have a list of 48 volunteers who, under the direction of ACRC Manager Leigh Madsen (our only paid employee), address the needs of our guests. Also OHRA charitable donations increased from \$2,904 in 2013 to \$34,918 in 2014 – a 1200% increase. In addition OHRA has been awarded over \$20,000 in private foundation grants during the last six months. These donations and grants have helped OHRA fund increased operation and services provided by the ACRC.*

*Unfortunately with this success has come the realization that ACRC's 2200 sq. ft. facility at 570 Clover Lane is woefully inadequate. Limited space does not allow the confidential continuum of care that many of our more challenging clients require. Limited private space also makes it very difficult for volunteer administrators to handle necessary confidential records. Likewise there is not enough storage space for the constant flow of in-kind donation and disbursement of clothing and cold weather gear.*

*If OHRA is going to continue to be successful in providing a pathway for financial self-sufficiency for our homeless and very low-income residents, we need to enlarge the ACRC facilities by purchasing the entire Masonic Lodge at 570 Clover Lane. This full facility could become the "one-stop shop" so obviously needed to fully serve the homeless and very low-income residents of Ashland.*

*One of the most significant advantages of this proposal is the enhancement that it would bring to the City Winter Shelter program. Currently OHRA assists with a team of City Shelter Partners<sup>1</sup> in the staffing (56 volunteers) of three winter shelter locations that are open Monday thru Thursday nights during the winter months between November 15<sup>th</sup> and April 15<sup>th</sup>. There are no regularly open shelters Friday thru Sunday nights except on an emergency basis (temperature below 20 degrees).*

*Under this proposal all Winter Shelters could be consolidation at a single, centralized, facility better suited to this purpose. With the increased efficiencies of a single location it is expected that Winter Shelter coverage could be extended to a full seven nights a week. Also, very importantly, there could be some significant integration of ACRC services to needy shelter guests.*

*In summary then this proposal would provide for the following homeless and low-income services:*

- Consolidation of three scattered winter shelters to one location*
- Increased in Ashland's winter shelter coverage to seven nights a week*
- Improved integration of ACRC services into the winter shelter population*
- Private space for in depth confidential case management*
- Confidential space for handling client records*
- Additional space to organize our flow of donated and dispersed items.*
- Space necessary for Job Development Resources and Training Project (The Leightman-Maxey Foundation and the City are funding for this project)*
- A private secure location where OHRA and ACRC financial documents could be processed and stored.*
- Two private rooms that could be used by our community partners<sup>2</sup> when they are*

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<sup>1</sup> Along with OHRA the other City Shelter Partners are: the City of Ashland, First Presbyterian Church, Trinity Episcopal Church; RV Unitarian Universalists Fellowship, Temple Emek Shalom, and Ashland First United Methodist Church.

<sup>2</sup> As of February 2015 our list of 27 Community Partners included: Ashland Community Food Bank; Ashland First United Methodist Church; Ashland UCC Church; Consumer Credit Counseling Service of

- on site – some require frequent visits, some infrequently.*
- A commercial kitchen and adjoining meeting room that could be used by OHRA, ACCESS, or any of our Community Partners for appropriate convening functions.*
- The commercial kitchen may also be valuable in providing new innovative programs designed for homeless and low-income families with children.*

*This Building Acquisition Project would be funded as follows:*

Requested CDBG Funds:	\$260,000 (over two years)
Ashland Affordable Housing Trust	\$100,000 (planned)
Organizational Match:	\$100,000 (planned capital campaign)
Funds from Other Sources:	
<i>Ford Family Foundation</i>	\$270,000 (planned)
<i>Total Other Foundations</i>	\$120,000 (planned)
Total Project Cost:	<hr/> \$850,000

Upon completion of the Building Acquisition the title would be held by the Options for Homeless Residents of Ashland (OHRA) organization.

We look forward to your questions and comments.

*John Wieczorek  
President of OHRA Board of Directors  
541-482-8230*

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*So. OR; Dept. of Disability Services; Easter Seals; Jackson Co. Mental Health; Jackson Co. Sexual Assault Response Team; Oregon Action; Phoenix First Presbyterian Church; RV Council of Governments; RV Unitarian Universalist Fellowship; RV Veterans and Community Services; Senior Protective Services; St. Vincent DePaul; Street Dogs; Temple Emek Shalom; The Listening Post; Permaculture Playground; Trinity Episcopal Church; Umpqua Bank; VA; VAHA; Veterans Services Office*

wiz@wave.net

Leigh Madsen

*Executive Director of the Ashland Community Resource Center*

541-482-9781

*lmadsen@accesshelps.org*





**CITY OF ASHLAND**  
**2014 Program Year Community Development Block Grant (CDBG)**  
**Application**

These completed Sheets shall be included as the first pages on all submittals.

**I. APPLICANT INFORMATION**

**Applicant Organization Name:**

*Options for Homeless Residents of Ashland (OHRA)*

**Executive Director's Name(s):**

*John Wieczorek, President of the Board of Directors of OHRA*  
*Leigh Madsen, Executive Director of Ashland Community Resource Center*

**Board Member Names (attach separate sheet)**

*John Wieczorek, Member and President*  
*Carolyn Anderson, Member and Secretary*  
*Harriet Snyder, Member and Treasurer*  
*Ken Gudger, Member*  
*Montye Male, Member*  
*Regina Ayars, Member*

**Applicant Mailing Address:**

*Options for Homeless Residents of Ashland*  
*PO Box 1033*  
*Ashland, OR 97520*

**Applicant Street Address:**

*Address of Ashland Community Resource Center*  
*572 Clover Lane*  
*Ashland, OR 97520*

**IRS Classification:**

501 C 3

**Federal Tax ID#:**



**Mission Statement:** (may be attached)

*OHRA is dedicated to providing homeless and low-income residents of Ashland with opportunities to improve their individual situations and leave poverty and homelessness behind. OHRA promotes responsibility for self care and caring for others, and seeks full inclusion of low-income residents in the life of the community.*

Total Employees: *One*

Total Volunteers: *106*

**II. CONTACT PERSON** (designate a contact person who is familiar with the project)

First Name: *John Wieczorek*

Title: *President of OHRA Board of Directors*

Phone Number: *541-482-8230*

Fax Number: *541-488-0052*

E-mail Address: *wiz@wave.net*

Second Name: *Leigh Madsen*

Title: *Executive Director of the Ashland Community Resource Center*

Phone Number: *541-482-9781*

Fax Number: *541-482-6935*

E-mail Address: *lmadsen@accesshelps.org*

**III. PROJECT INFORMATION SUMMARY**

Project Name or Title:

*OHRA Building Acquisition for the Ashland Community Resource Center and Ashland Winter Shelters*

Expected Completion Date:

*It is expected that the project will be completed upon the City's award of the second CDBG Grant.*

<i>Requested CDBG Funds:</i>	<i>\$260,000 (over two years)</i>
<i>Ashland Affordable Housing Trust</i>	<i>\$100,000 (planned)</i>
<i>Organizational Match:</i>	<i>\$100,000 (planned capital campaign)</i>
<i>Funds from Other Sources:</i>	
<i>Ford Family Foundation</i>	<i>\$270,000 (planned)</i>
<i>Total Other Foundations</i>	<i>\$120,000 (planned)</i>
<i>Total Project Cost:</i>	<hr/> <i>\$850,000</i>

## **Application Contents**

A complete proposal shall include a brief narrative summary on applicant letterhead, full project cost, all federal, state and local subsidies requested for the project, proposed ownership entity, phone number and mailing address of contact person for the designated non-profit or certified Community Housing Development Organization.

*As requested this information has been included in the cover letter to this document*

**Provide the information listed below numbered and in the order listed so that we can find the required information easily and award full credit for your responses. If the question does not apply to the proposed project write N/A.**

- 1) Complete Application Form (see page 16).  
*The Complete Application Form has been duplicated and completed beginning on page 1 of this document*
- 2) A project summary including a brief description, project background and a list of project objectives

*Brief Project Description:* *Purchase of the 8390 sq. ft. existing Masonic Lodge located on Clover Lane in Ashland, Oregon*

*Project Background:* *Since ACRC opened its doors in February of 2014 we've experienced a growing client load. Presently an average of 25 clients a day visit the Center and*

*the existing 2200 sq. ft. leased space (from the Masonic Lodge) is insufficient to handle this level of client traffic.*

*Project Objectives: Purchase and develop a space that will be able to handle the following services: 7 night a week winter homeless shelter, job search and resume services, housing referral services, case management, personal identity documentation services, mailing , internet access, printing and various personal services (food, clothing, restroom, backpack storage, bus tokens, cold weather gear and etc.). Additionally the planned space would be able to consolidate all existing Ashland homeless sheltering into one single unit capable of serving not only adult male and female guests but also families with minor children.*

- 3)** Property and Project Information relating to acquisition, rehabilitation, site clearance, and development (*section not applicable for social service applications involving direct services to qualified low- or extremely low- income persons*)

*It is expected that rehabilitation, site clearance, and development would be minimal. Any minor partitioning or improvement of space utilization could be handled through OHRA funds.*

Provide a map showing the project's location. If the project will serve a specific area, proposed project boundaries should be shown.

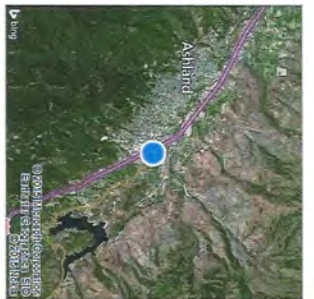
bing Maps

42.1832152929415, -122.662644083563

My Notes

Empty text box for notes.

On the go? Use m.bing.com to find maps, directions, businesses, and more.



http://www.bing.com/maps/print.aspx?mk=cn-us&z=19&s=1&kcp=42.183215,-122.662644... 2/9/2015

Describe details regarding any property proposed for acquisition, indicating the following:

- a) Property location relative to jobs, schools, transportation, shopping and services  
*Next door to Ashland Community Food Bank and within one mile of a full range of retail services. Reasonably accessible by public transportation.*
- b) Total floor area of buildings, and size of land site  
*8390 sq. ft. and 0.79 acres*
- c) Types of residential units, number of each type unit, and total number of bedrooms  
*NA*
- d) Number of extremely-low, low-, and moderate-income units proposed  
*NA*
- e) Number of units accessible to the disabled

*Existing building is accessible to the disabled. No housing units are planned*

- f) Square footage of units and description of amenities such as private balconies or storage areas  
*NA*
  - g) Square footage of common areas such as community or laundry rooms  
*NA*
  - h) Square footage of commercial space, if any  
*NA*
  - i) Year property was built. If pre-1978, will it be occupied by children under the age of six?  
*Built in 1999*
  - j) Describe condition of any existing housing proposed for acquisition and any alterations planned. Briefly discuss the total cost of the proposal relative to new construction.  
*NA*
  - k) If the project involves rehabilitation attach a description of the work to be completed.  
*NA*
  - l) Describe the target population. Include the suitability of the property for the target population, the tenant selection process, brief description of any residential services and the resources identified to fund the services.  
*275 homeless*  
*2500 low-income*
  - m) Indicate how many years the property will remain affordable and the mechanism that will be used to ensure the affordability period.  
*NA*
- 4)** Briefly describe the services to be provided, if any, and describe the eligible target population receiving direct benefit from these services (low-income, homeless, special needs).

Services to be provided:

*7 night a week winter shelter*  
*job search services*

*resume services*  
*housing referral services*  
*case management*  
*personal identity documentation services*  
*mailing*  
*internet access*  
*printing*  
*various personal services (food, clothing, restroom, backpack storage, bus tokens, cold weather gear and etc.)*  
*Winter Homeless Shelter Program*

*Target Population:*

*Homeless population estimated to be 275*

*Very low-income population estimated to be 2,500*

- 5) A work program and time line including a complete list of tasks with estimated start and completion of each task (please complete attached Form A – Project Schedule).

*See schedule Form A*

- 6) Financial Information *see Form C*  
A budget describing total cost, cost per task, existing (secured) project funds and unfunded costs. Identify any and all source(s) of funding. This would include other Federal and State grants and loans, monetary donations, in-kind contributions, volunteer labor, donation of materials and supplies, etc. In addition to addressing the questions below please complete attached Form B – Uses of Funding & Form C – Sources of Funding.

Provide a detailed financial description of the proposed project, including Rent Schedule, Sources/Uses of Funding and Operating Budget Income/Expense, and utility allowances

- a) Describe the assumptions used to determine the total project cost. Indicate the sources consulted and how costs were determined.

*Price per square foot analysis of recent sales of nearby commercial real estate*

- b) Was consideration given to remaining economic life of the property and potential cost increases such as unanticipated repair or relocation costs? Maintenance costs? Operating costs?

*(Not applicable for social service applications involving direct services to qualified low- or extremely low- income persons)*

*Building built in 1999 appears to have received good maintenance and will have a building inspection prior to purchase. We have considered the cost of maintenance and operations.*

c) Describe the financial assumptions used to develop the operating budget. Include projected rent increases, other sources of income for operation and maintenance expenses, and inflationary factors. For social service award requests please include financial assumptions relating to increases in wages, materials and overhead, or other costs associated with the proposed activity.  
*Initial analysis has indicated that all operating costs will be offset by the savings we achieve by no longer paying \$18,000 annually for the present ACRC lease.*

d) Discuss non-typical expenses or those outside industry standards.  
*NA*

e) Attach letters of funding commitment from other sources, if available.  
*In process*

f) Will a property tax exemption be requested for the project? If so, what is the estimated dollar value of the tax exemption over the twenty-year period? Please briefly detail the calculation method used to estimate the value and the process your organization would undertake to obtain the exemptions or appraised value adjustment.  
*(Not applicable for social service applications involving direct services to qualified low- or extremely low- income persons)*  
*Property is presently exempted and OHRA would apply for an extenuation.*

7) Eligibility for Federal Funding  
Will any of the following activities be part of the proposed project?

- Property Acquisition *YES*
- New Construction (non-residential)
- Removal of Architectural Barriers
- Rehabilitation Costs
- Development Costs
- Client Services



- Specification Preparation (Construction/Rehab)
- Relocation Benefits (if required)
- Appraisal (for acquisitions)

Federal funding has certain regulatory requirements. The following information is required to determine eligibility for federal funding.

### **General Information**

- Is the proposed project within the Ashland City limits? If not, explain. *Yes. Within Ashland City limits.*
- Specify the proposed tenant or client income level; state in terms of percentage below area median for the Medford-Ashland standard metropolitan statistical area (MSA). The current income guidelines are included on page 10 above.

*The proposed client income level is Extremely Low Income and Low Income. To our experience all our clients (100%) are in this category.*

- Describe any financial or legal commitments made to the project.  
*OHRA Board of Directors has reviewed the financial requirements for this proposal and is committed to a capital fund drive and pursuing other grants as required to completed the project.*

### **Housing Development, Land Acquisition, or Rehabilitation Specific Information**

- Will permanent housing units be converted or demolished? If so, how many? *No*
- Is the proposed housing site located in a 100-year flood plain? *No*
- Has a Level 1 environmental assessment been done for the site? If yes, attach the report. *Our information is that a level 1 environmental assessment is not required for an existing structure that is not being expanded.*
- Is the proposed housing site located adjacent to a major arterial road or near a railroad? *No*

- h) Is the proposed site located adjacent to an aboveground flammable storage tank? *No*
- i) Will the proposed project impact historic features? If yes, explain. *No*

- 8) Briefly describe the agency's mission and service history. The City may request copies of the agency's financial audit or review for the last two years prior to contract signing in order to determine agency's capability to successfully complete the project.

*OHRA is dedicated to providing homeless and low-income residents of Ashland with opportunities to improve their individual situations and leave poverty and homelessness behind. OHRA promotes responsibility for self care and caring for others, and seeks full inclusion of low-income residents in the life of the community.*

*OHRA filed its By Laws with the State of Oregon on June 18,2012 and received its 501(c)(3) approval on June 10,2014*

- 9) Will the project promote self-sufficiency for extremely low-, low- moderate-income families, or individuals with special need? *Yes*

- 10) Please identify how your project benefits extremely low-, low- and moderate-income individuals or individuals with special needs.

*A general comment about our response to the following questions in this section (section 10): Our initial client in-take interview at the ACRC (the "Snapshot") has been geared not to the Medford-Ashland income level, but primarily to the housing status of the perspective client (is he/she presently housed or living on the street) and secondarily is the perspective client currently employed or not. Although not a direct correlation, it does appear that those not employed and/or living on the street would appear to be "extremely-low income" individuals and those who are employed and/or living in a home are "low income and moderate income" individuals. (It is our experience that few of our clients would classify as moderate income individuals). Thus of the 600 distinct in-take individuals we served in the last 12 months 347 (or 58%)*

were extremely low income and 253 (or 42% were low-income individuals). Given the needs of this information our in-take interview could be tailored to provide more precise information in the future.

Obviously we wish to continually improve our services to both the extremely-low income, homeless and the low-income, housed individuals. In particular, however we are searching for more effective ways to reach the low-income, often marginally housed individuals. These are "America's working poor" and often just a paycheck or two away from becoming homeless. This proposal (with its commercial kitchen) will be valuable in providing new innovative programs targeted for the families with children who are often found in the low-income category.

Services to be provided:

- Seven night a week winter Shelter services*
- Job search services*
- resume services*
- housing referral services*
- rent assistance / utility assistance*
- case management*
- case management for special needs (for example substance addiction and domestic abuse)*
- personal identity documentation services*
- mailing*
- internet access*
- printing*
- various personal services (food, clothing, restroom, backpack storage, bus tokens, cold weather gear and etc.)*

- a) For proposed projects serving a low-income area (i.e. public facility improvements, community center or other neighborhood serving facility), provide the following data, including documentation of the sources of information for the following statistics:
- Number of extremely-low, low- and moderate-income individuals served in the project area on an annual basis.
  - Total number of individuals served in project area on an annual basis.

*OHRA serves only homeless and low-income clients and from February 2014 to February 2015 we served 600 clients. It is fully expected that the number of clients served will increase with this proposal.*

b) For proposed projects serving a target population (i.e. homeless families, battered women, people with AIDS, special needs populations, etc.) provide the following data, including document sources of information for statistics.

- Specify the target population to be served.  
*275 homeless and 2,500 very low-income*
- Number of low and moderate-income individuals in target population to be served on an annual basis. (This count cannot include repeated visits or use by the same individuals.) *The total population of low and extremely low-income individuals in Ashland is estimated to be 2500. In the most recent year we served 253 individuals (w/o repeat visits). It is fully expected that the number of clients served will increase with this proposal.*
- Total number of individuals in target population to be served on an annual basis. *Our target population is the extremely-low and low-income levels and we served a total of 600 individual over the last year (w/o repeat visits). It is fully expected that the number of clients served will increase with this proposal.*
- Percent low and moderate income. *Based on our experience we infrequently serve the moderate-income level. 600 individuals is approximately 22% of the target population (total population = 275 + 2500 = 2750)*

11) Briefly describe how your proposal will ensure that moderate-income individuals do not benefit to the exclusion of extremely-low or low-income individuals. *Income levels are reviewed by our "client in-take process." However, it is our experience that "moderate-income" individuals do not desire or need the type of services that OHRA and ACRC provide.*

12) Indicate if you expect the project to cause low and moderate-income housing to be demolished or converted to another use (see attachment "Relocation Strategy Guidance"). If so, explain. *No. Low and Moderate income housing will not be demolished or converted to another use.*

13) Project Feasibility

Please describe your readiness to proceed concerning whether land use issues have been resolved and whether your organization has the administrative capacity to complete the project proposed.

Describe the feasibility of the project:

a) Does the applicant have the experience and capacity to complete and or manage the project proposed? Briefly describe applicants capacity and experience in providing, maintaining and managing housing, particularly low-income housing similar to the proposed project.

*OHRA is currently managing the operations of ACRC and OHRA Board members have experience in managing and staffing the Winter Shelters.*

b) Are the ongoing operating expense and maintenance reserve estimates reasonable?

*The operating and maintenance reserve is embedded with the savings of the \$18,000 annual lease payment now made to the Temple.*

c) Does the applicant have a purchase option on the property, letter of support from the property owner(s), or some other assurance that the property is available for acquisition?

OHRA has had positive indications of interest. However, the non-profit nature of the selling organization will require a full membership meeting to be noticed and held.

d) Does the project require temporary or permanent relocation and if so have comparable units been identified and costs of relocation been accurately determined?

Provide a tenant relocation strategy, cost estimate and existing tenant survey to address federal Uniform Relocation Act requirements which may impact your project.

*N/A*

- e) Describe relocation strategy for the project.  
*NO*
  - f) Does the project require land use approvals such as Site Review, Annexation, Zone Change, Minor Land Partition, Demolition, or Conditional Use permits?  
*It is our understanding that the Winter Shelter will require a Conditional Use Permit comparable to the hotel across Clover Lane. The existing ACRC is a currently permitted use within the zone.*
  - g) Has a pre-application been completed with the Ashland Planning Department?  
*OHRA Board will schedule pre-application with Ashland Planning Department.*
  - h) What is the condition of any improvements on the property and what is the expected life of the property?  
*Building was built in 1999 and our initial inspection indicates that improvements will be minimal.*
  - i) Describe commitment of project funding from other sources  
*OHRA is in the process of obtaining additional funding.*
- 14)** Indicate whether the project will have any negative impacts on historic or architecturally significant properties on the environment. All projects will be subjected to an Environmental Review Report and certain projects depending on scale, i.e. new construction, must undergo an Environmental Assessment. *NA*
- 15)** Please attach any other statistical data, letters of support, applicable experience of the sponsor, evidence of financial support from other funding sources, or other material you believe will assist the City in its review of your proposal.
- 16)** CDBG Application Checklist (see pages 25-26). Attach Forms A, B, & C.

**CITY OF ASHLAND**  
**2014 Program Year**  
**CDBG APPLICATION CHECKLIST**

In order to determine compliance with all applicable HUD regulations and to help to ensure that projects will be eligible for CDBG funding, the City of Ashland will need to address all HUD requirements. The purpose of this checklist is to point out areas where potential problems could arise. Obviously, this is a comprehensive list, which must evaluate a wide array of different kinds of proposals. Therefore, not every item will be applicable to every project. **Please fill it out entirely indicating all items which are not applicable and include it as part of your proposal application.**

<b>A. Applicant's Background</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Is the applicant a legal non-profit organization or unit of government?	X		
2. Do the proposed clients or users of the project meet HUD Income Guidelines (see page 10 for guidelines)?	X		
3. Does applicant have the capability to maintain written income documentation?	X		
4. Has the applicant made a legal or financial commitment to a proposed project?		X	
5. Is the applicant primarily a religious organization?		X	
6. Has the applicant administered a CDBG project previously?		X	
7. Is your agency willing and able to provide all required reports and accountability to the City as required by HUD?	X		
<b>B. Project Location and Land Use Issues</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Has a location for the project been selected?	X		
2. Is the proposed project within the Ashland City limits?	X		
3. Does the proposed project meet local zoning and land use laws?	X		
4. Are any land use permits such as a Site Review, partition, annexation or Conditional Use Permit required? A conditional use permit will be require for the shelter	X		
5. Have these approvals been obtained?		X	
6. Does the project comply with current building code requirements?	X		
7. Does the project meet handicapped accessibility requirements?	X		

<b>C. Environmental Issues</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Is the project located in the 100-year floodplain?		X	
2. Is a wetland located on the project site?		X	
3. Has any environmental contamination been identified on the project site?		X	
4. Has asbestos been identified on the project site?		X	
5. If project involves an exiting structure, was it built 1978 or earlier? If year built is known, please specify.		X	
6. Is the proposed project located on a major arterial or near the railroad?	X		
7. Is the proposed project located adjacent to an above ground flammable storage tank?		X	
8. Does the proposed project involve a structure that is 50 years or older?		X	
9. Will the applicant complete a Phase I environmental review upon receiving a CDBG award?	X NA		
<b>D. Labor Requirements</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Does the project involve construction over \$2,000 in cost?		X	
2. Will the project trigger Davis-Bacon wage requirements?		X	
3. Will the project trigger BOLI wage requirements?		X	
4. Does the project involve over \$18,703 in City awarded grants or contracts?	X		
<b>E. Displacement and Relocation</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Will tenants be displaced by the project?		X	
2. Will a business be displaced by the project?		X	
3. Will housing units be demolished or converted?		X	
<b>F. Property Data</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Does the applicant own the property by fee simple title?		X	
2. Are taxes on the property current?	X		
3. Is insurance current?	X		
4. What is the current debt against the property?	None		
5. What is the current use of the property? <i>6000 Sq. Ft. currently used as a 501(c)(3) Masonic Lodge, 2200 Sq. Ft. currently leased to ACRC</i>			



6. Has an appraisal on the property been conducted? If yes, what is the assessed value of the property?		X	
--	--	---	--

**Form A-1 *Not Applicable***  
**To be completed for Development or Rehabilitation Proposals**

**Housing Proposals**

Activity	Start Date	Completion Date
<b>Site Planning &amp; Development</b>		
Option		
Site Acquisition		
Plan Development		
Pre-application		
Land Use Approval		
Construction Plans		
Final Bids		
Contractor Selection		
Building Permits		
<b>Grant applications</b>		
local		
state		
federal		
Non-government		
other		
<b>Loan Applications</b>		
Construction loan		
Permanent		
<b>Construction Phase</b>		
Construction		
Certificate of Occupancy		

***Please provide your best (realistic) date estimates regarding the project schedule***

**Form A-2 *Not Applicable***  
**To be completed for Social Service Proposals**

**Social Services Proposals**

Activity	Start Date	Completion Date

**Social service providers should list key benchmarks in the table above for their proposed projects (IE hire of personnel, application for further funding, initiation of direct client services, etc)**

**Form B-1 *Not Applicable***  
**To be completed for Development or Rehabilitation Proposals**

**Uses of Funding**

**Housing Proposals**

	<b>Total Cost</b>	<b>CDBG Request</b>	<b>Other Source(s)</b>
<b>Acquisition Costs</b>			
Land			
Improvements			
Liens and other Taxes			
Closing costs			
Off-Site costs			
Other			
<b>SUBTOTAL</b>			
<b>Development Costs</b>			
Land Use Approvals			
Building Permits/fees (Include Engineering and Community Development Fees)			
System Development Charges (SDCs)			
Relocation Costs			
Environmental Report / Lead Based Paint Clearance			
Soils Report			
Survey			
Marketing			
Insurance			
Other			
<b>Fees</b>			
Architectural/Engineering			
Legal/Accounting			
Appraisals			
Lender fees			
Construction Loan			
Permanent Loan			
Tax Credit Fees			
Developer Fee			
Consultant Fee			
Other			
<b>TOTAL</b>			

**Form B-2 *Not Applicable***  
**To be completed for Social Service Proposals**

**Social Service Proposals**

	<b>Total Cost</b>	<b>CDBG Request</b>	<b>Other Source(s)</b>
<b>Direct Client Services</b>			
Wages (of personal providing direct client services)			
Materials/Supplies			
Marketing/Outreach			
<b>Program Administration</b> Includes overhead and general staffing necessary to administer the program (accounting, management, grant administration) but that does not provide direct benefits to the client.		<b>CDBG Funds are not available for program administration</b>	
<b>Total Project Cost</b>			

## Form C

### SOURCE(S) OF FUNDS FOR OPERATING EXPENSES WORKSHEET

Completeness of this worksheet establishes the capacity of the organization to sustain the operations of the program(s).

Sources	Secured	Conditional <small>(awarded with conditions)</small>	Tentative	Commitment Date
Federal Grants			\$260,000	
State Grants				
Local Grants			\$100,000	
Non Governmental Grants			\$390,000	
Donations/Gifts				
Applicant Contribution			\$100,000	
Program Income				
Loans				
Other (specify)				
Other (specify)				
<b>TOTAL</b>			<b>\$850,000</b>	

Please provide a description the timeline of loan and grant application dates as related to the proposed project. Specifically, for any tentative funding sources please provide application dates, award dates and funding availability dates.

*OHRA Board has begun discussions with local and statewide Charitably Foundations. Early feedback has been very positive for this type of project in a rural area (less than 30,000 population). It is presently planned that Grant preparation and submittal will occur in the next 3 months with Grant approvals expected 3 to 6 months after that. The Board is presently considering the optimum time for initiating its planned Capital Campaign.*

**Form D**

**DISCLOSURE OF INTERESTS**

To assist the City of Ashland in determining whether there may be a potential conflict of interest related to the expenditure of Community Development Block Grant funds we request the following information be provided by applicants:

ORGANIZATION NAME:

- 
- Organization is:
- 1. Corporation ( )
  - 2. Non-Profit 501C3 (X )
  - 3. Partnership ( )
  - 4. Sole Owner ( )
  - 5. Association ( )
  - 6. Other ( ) \_\_\_\_\_

**DISCLOSURE QUESTIONS**

If additional space is necessary, please attach a separate sheet.

1. State the names of each "employee" of the City of Ashland having a financial or personal interest in the above mentioned "organization" or project proposed.

Name, Job Title and City Department

*None*

2. State the name(s) of any current or prior elected or appointed "official", of the City of Ashland having a potential "financial interest" in the organization or project.

Name/Title

*None*

3. Provide the names of each "board member" of the Organization seeking CDBG funding Name Board, Commission, or Committee (may be attached as a separate Sheet)

- 1 *John Wieczorek*
- 2 *Carolyn Anderson*
- 3 *Harriet Snyder*
- 4 *Ken Gudger*
- 5 *Montye Male*
- 6 *Regina Ayars*

If the applicant has provided names in question 1 or 2, please provide details regarding any known potential conflicts of interest in an attached narrative.

*Board member Regina Ayars is a Member of the Ashland Housing and Community Services Committee and has not provided any input or direction in the preparation of this proposal*

February 18, 2015

City of Ashland  
ATTN: Ms. Linda Reid  
City of Ashland Planning Division  
Ashland, Oregon 97520

Dear Linda:

Enclosed please find the proposal and grant application to the City of Ashland for the 2015 Ashland CDBG from Habitat for Humanity/Rogue Valley. The proposal consists of funding requested to continue the repair/rehab program for low income home owners in Ashland, Oregon.

The program was developed within the Habitat organization in 2012 implemented strictly in Ashland with the funding award from the CDBG funding in 2014. The program was slower to get started than expected. We hired a part time staff to manage the projects marketing of the program was also slow and a staffing transition delayed the process as well.

The majority of those interested in the program were mobile home owners, and we had elected to exclude mobile homes from the program. A critical home repair project for a homeowner on Avery St has been in progress with completion expected by March, 2015. Several smaller exterior projects have been identified and we are confident we will fulfill the agreement of the previous grant award by June 30, 2015.

Through evaluation of the 2014 program, we have decided to include mobile homes for future projects as that appears to be of the greatest need. We have staff fully trained, have developed volunteers strictly from and for Ashland projects, and have made great strides in educating the Ashland community of the Habitat repair program.

The Board of Directors fully supports the application to the City of Ashland for the home repair program project in the amount of \$80,000.00, and is willing to answer additional questions or address concerns if necessary. You are always welcome to visit, and tour our current projects. On behalf of the Board of Directors, volunteers, and especially our selected families, I thank you for your consideration of this request.

Sincerely,

Denise James  
Executive Director



Habitat for Humanity Rogue Valley  
Contact: Denise James, Executive Director  
541-773-3411  
PO Box 688  
Medford, OR 97501

## 2015 CBDB Proposal Narrative

Project Cost: \$100,000  
Funding Request: \$80,000

### **2) Project Summary:**

Habitat for Humanity/Rogue Valley (HfHRV) is a nonprofit organization which provides an opportunity for suitable, decent housing to the low income by either building houses or providing needed repairs for low-income people living in Jackson County. The proposed project is to continue with a repair program in Ashland, which was established in 2014. Funding is requested in the amount of \$80,000 in which at least 15 repair projects can be completed to benefit Ashland residents with a part time staff person to oversee and manage each project through completion.

The project addresses Goal # 3 in the City of Ashland's 2010-2014 Consolidated plan to maintain the existing affordable housing supply with priority funding to projects that will provide benefits to residents with the lowest incomes. Also, funding priority is given to those programs which recapture rehabilitation costs for further use in Ashland. The National Objective met is to benefit low and moderate income persons. There is a need for critical home repair to many homes in Ashland, small exterior projects as well as critical issues many mobile home owners face. Habitat for Humanity/Rogue Valley has the capacity, and experience to fulfill the expectations of the project. The entire community will benefit in the able to offer a range of repairs available to low income home owners including the working class and lower-income population.

Habitat for Humanity/Rogue Valley's philosophy is that this is a *hand up*, not a *handout*. Each selected applicant must contribute "sweat equity" by working on the project, assisting the volunteers or helping in some way for the organization. HfHRV is the general contractor for each project, following all building codes and requirements. Providing most of the labor for construction, volunteers are the backbone of the organization. Professionals, contractors and trades people donate their skills while others perform most of the daily tasks. Most of the materials are donated or sold at a discount to Habitat/RV by local suppliers.

HfHRV requests funding in the amount of \$80,000 of CDBG funds to continue the repair program established in Ashland in 2014. Funding will contribute towards the completion of an estimated



four critical home repair projects as well as a minimum of 11 smaller exterior projects. An environmental assessment will be complete and approved by the city of Ashland for each project to maintain compliance with HUD requirements. To qualify for the program, applicants must have low income, between 30-60% of the federal median income, and have an ability to repay a micro loan. In addition, the applicant must be a homeowner and a resident of the property. The applicant must have need for repair and those with the evaluation of greatest need will be given priority. Upon completion of the project a micro-loan will be provided to the selected applicant with repayment terms manageable. All repayment of funds received to HfHRV will be restricted to future projects.

### **Repair Program**

- The repair program was implemented in Jackson County in 2012 and 10 small projects were complete in 2013 throughout the Rogue Valley
- The program was introduced to the Ashland area in 2014 with the award of the 2014 CDBG grant with an expectation to complete two critical repairs and 10 small projects. The program was slow to start as applicants remained unsure of the program. A campaign to increase community awareness was implemented developing new interest.
- Criteria developed in 2014 denied work on mobile homes, due to a high possibility of critical needs higher than could be completed. However, the highest number of applicants in 2014 were mobile home owners. In 2015, the program has been expanded to include mobile homes, restricted to specific repair issues.
- Staffing cost was not included in the original program development. One part time staff manger is dedicated to Ashland only projects. Staffing costs have been included in the funding proposal.

### **3) Property and Project Information relating to acquisition, rehabilitation, site clearance, and development (section not applicable for social service applications involving direct services to qualified low- or extremely low- income persons)**

*Project locations will be strictly limited to the boundaries of the city of Ashland.*

Describe details regarding any property proposed for acquisition, indicating the following:

- a) Property location relative to jobs, schools, transportation, shopping and services

*Project sites will vary, and will be evaluated individually*

- a) Total floor area of buildings, and size of land site

*Project sites will vary, and will be evaluated individually*

- b) Types of residential units, number of each type unit, and total number of bedrooms

*The number of units have not been specifically identified, projects will vary in size and need. Projects will be limited to low income home owners.*

- c) Number of extremely-low, low-, and moderate-income units proposed

*All selected applicants will have an income between 30-60% of federal median income. An estimated five critical home repair projects will be identified and completed as well as 15 smaller exterior projects.*

- d) Number of units accessible to the disabled

*Handicap accessibility will be a focus, as well as renovate to accommodate aging in place.*

- e) Square footage of units and description of amenities such as private balconies or storage areas

*n/a*

- f) Square footage of common areas such as community or laundry rooms

*n/a*

- g) Square footage of commercial space, if any

*n/a*

- h) Year property was built. If pre-1978, will it be occupied by children under the age of six?

*All projects for properties built prior to 1978 will be screened for lead and asbestos. Each project will be screened for any environmental issues, and appropriate measures will be used.*

- i) Describe condition of any existing housing proposed for acquisition and any alterations planned. Briefly discuss the total cost of the proposal relative to new construction.

*n/a*

- j) If the project involves rehabilitation attach a description of the work to be completed.

*The scope of work for rehabilitation projects will depend on the need of repair based on each individual need.*

- k) Describe the target population. Include the suitability of the property for the target population, the tenant selection process, brief description of any residential services and the resources identified to fund the services.

*The target population includes income levels between 30-60% of the federal median income specific to Jackson County and have the ability to repay a loan of the cost of repair. The program will be available to the low income residents of the city of Ashland.*

- l) Indicate how many years the property will remain affordable and the mechanism that will be used to ensure the affordability period.

*In the event the property is sold, or when title transferred, the entire balance of the note will be due. Liens are placed on homes*

*with construction loans over \$3,000 and affordability restrictions upon sale for up to 10 years. All funds received from loan payments will be used in future projects for low income housing in Ashland.*

**4) Briefly describe the services to be provided, if any, and describe the eligible target population receiving direct benefit from these services (low-income, homeless, special needs).**

*The repair program will provide services of home repair to an estimated 20 families in Ashland. The target population will be any homeowner in need of service that fits within the income criteria. Homeowners must be current in taxes, have no other liens or judgments against the property and have current property insurance. Seniors with needs for aging in place will be a focus as well as mobile home owners to a limited degree.*

**5) A work program and time line including a complete list of tasks with estimated start and completion of each task (please complete attached Form A – Project Schedule).**

*The process of identifying clients will include an application process, verification of income with the ability to repay, as well as willingness to participate with Habitat for Humanity in the process. The scope of work will be assessed and a memorandum of understanding agreement will be developed with the homeowner. The project work will commence within the guidelines of the funding restrictions.*

**6) Financial Information**

A budget describing total cost, cost per task, existing (secured) project funds and unfunded costs. Identify any and all source(s) of funding. This would include other Federal and State grants and loans, monetary donations, in-kind contributions, volunteer labor, donation of materials and supplies, etc. In addition to addressing the questions below please complete attached Form B – Uses of Funding & Form C – Sources of Funding.

*Funding will primarily be secured through the City of Ashland Community Development Block Grant Program, as well as monetary donations, donations of professional services and material from community partnerships as well as volunteer labor.*

Provide a detailed financial description of the proposed project, including Rent Schedule, Sources/Uses of Funding and Operating Budget Income/Expense, and utility allowances

- a) Describe the assumptions used to determine the total project cost. Indicate the sources consulted and how costs were determined.  
*All assumptions have been based on the experience of construction and previous projects.*
- b) Was consideration given to remaining economic life of the property and potential cost increases such as unanticipated repair or relocation costs? Maintenance costs? Operating costs?

*(Not applicable for social service applications involving direct services to qualified low- or extremely low- income persons)*

*Homeowners will be responsible for the future upkeep and maintenance unless other arrangements are made, such as senior service care, or other such as church or family commitments. Past history has shown very little relocation necessary, and all situations are evaluated and designed to help the highest number of those in need. Maintenance and repair will add to the economic life of the home, many times adding another 30-40 years of life to a home.*

- c) Describe the financial assumptions used to develop the operating budget. Include projected rent increases, other sources of income for operation and maintenance expenses, and inflationary factors. For social service award requests please include financial assumptions relating to increases in wages, materials and overhead, or other costs associated with the proposed activity. *Assumptions were developed based on actual operation and maintenance costs.*
- d) Discuss non-typical expenses or those outside industry standards. *There have been no non-typical expenses identified.*
- e) Attach letters of funding commitment from other sources, if available. *Funding sources are committed upon the identification and approval of individual projects. Thrivent Financial has verbally committed to support small exterior projects completed in 2015.*
- f) Will a property tax exemption be requested for the project? If so, what is the estimated dollar value of the tax exemption over the twenty-year period? Please briefly detail the calculation method used to estimate the value and the process your organization would undertake to obtain the exemptions or appraised value adjustment.

*(Not applicable for social service applications involving direct services to qualified low- or extremely low- income persons)*

*n/a Habitat for Humanity will not take ownership of land or property for the repair program.*

**7) Financial Information** Will any of the following activities be part of the proposed project?

- Property Acquisition
- New Construction (non-residential)
- Removal of Architectural Barriers
- Rehabilitation Costs
- Development Costs
- Client Services
- Specification Preparation (Construction/Rehab)

- Relocation Benefits (if required)
- Appraisal (for acquisitions)

Federal funding has certain regulatory requirements. The following information is required to determine eligibility for federal funding.

*Funding will be used strictly for repair and rehab*

### **General Information**

- Is the proposed project within the Ashland City limits? If not, explain.  
*All projects will be within the Ashland City limits.*
- Specify the proposed tenant or client income level; state in terms of percentage below area median for the Medford-Ashland standard metropolitan statistical area (MSA). The current income guidelines are included on page 10 above.  
*Applicants must be within the 30-60% area median income to be eligible for the program*
- Describe any financial or legal commitments made to the project.  
*No commitments have been made.*

### **Housing Development, Land Acquisition, or Rehabilitation Specific Information**

- Will permanent housing units be converted or demolished? If so, how many?  
*Demolition is not expected for repair.*
- Is the proposed housing site located in a 100-year flood plain?  
*Unknown*
- Has a Level 1 environmental assessment been done for the site? If yes, attach the report.  
*No-an environmental assessment will be complete for each project site.*
- Is the proposed housing site located adjacent to a major arterial road or near a railroad?  
*There are no identified projects at this time.*
- Is the proposed site located adjacent to an aboveground flammable storage tank?  
*There are no identified projects at this time, although it is doubtful a project with this issue would be approved.*
- Will the proposed project impact historic features? If yes, explain.  
*There are no projects identified at this time with historic features.*

8) Briefly describe the agency's mission and service history. The City may request copies of the agency's financial audit or review for the last two years prior to contract signing in order to determine agency's capability to successfully complete the project.

*The mission is to provide a decent place to live for all, including the low income and in partnership with those in need. The repair program is relatively new to the community; typical Habitat projects have been new home construction. Approximately 20 repair projects have been completed in the Rogue Valley and each project becomes a learning experience for future tasks. The agency has constructed 54 homes in partnership with selected applicants, over 1200 volunteers annually and professional staff.*

9) Will the project promote self-sufficiency for extremely low-, low- moderate-income families, or individuals with special needs?

*The program will promote self-sufficiency for the low income by allowing many to stay in their homes, and the opportunity to live in a safe and decent environment. Many improvements will affect the utility usage, allowing for energy savings, leading to an increase in the monthly cash available which can be used for other priority needs in the family.*

10) Please identify how your project benefits extremely low-, low- and moderate-income individuals or individuals with special needs.

a) For proposed projects serving a low-income area (i.e. public facility improvements, community center or other neighborhood serving facility), provide the following data, including documentation of the sources of information for the following statistics:

- Number of extremely low-, low- and moderate-income individuals served in the project area on an annual basis.
- Total number of individuals served in project area on an annual basis.

b) For proposed projects serving a target population (i.e. homeless families, battered women, people with AIDS, special needs populations, etc.) provide the following data, including document sources of information for statistics.

- Specify the target population to be served.
- Number of low and moderate-income individuals in target population to be served on an annual basis. (This count cannot include repeated visits or use by the same individuals.)
- Total number of individuals in target population to be served on an annual basis.
- Percent low and moderate income.

*The population served is the low income, including seniors and disabled. Approximately 30 individuals are provided service each year directly. An additional 50-100 individuals seek service through specific training programs. The*

*number served from the population of battered women, special needs is not documented, although verification of income is verified.*

- 11) Briefly describe how your proposal will ensure that moderate-income individuals do not benefit to the exclusion of extremely-low or low-income individuals.

*Incomes are verified through the application process.*

- 12) Indicate if you expect the project to cause low and moderate-income housing to be demolished or converted to another use (see attachment "Relocation Strategy Guidance"). If so, explain.

*Projects are not expected to create demolition or create relocation for the client.*

### 13) Project Feasibility

Please describe your readiness to proceed concerning whether land use issues have been resolved and whether your organization has the administrative capacity to complete the project proposed.

*There are no land issues identified at this time.*

Describe the feasibility of the project:

- a) Does the applicant have the experience and capacity to complete and or manage the project proposed? Briefly describe applicants capacity and experience in providing, maintaining and managing housing, particularly low-income housing similar to the proposed project.

*The Habitat for Humanity organization has built and sold 54 homes and plans to complete five-six homes each year. The repair program is fairly new and the organization was slow in developing the applications and community awareness of the program advantages. Each project becomes a learning tool for future ease and increase in benefit. Over 1200 volunteers participate each year with the program, and 1.5 FTE qualified construction staff oversee projects, which includes on part time position specific to management of Ashland projects.*

- b) Are the ongoing operating expense and maintenance reserve estimates reasonable?

*n/a*

- c) Does the applicant have a purchase option on the property, letter of support from the property owner(s), or some other assurance that the property is available for acquisition?

*The repair program is strictly for homeowners.*

- d) Does the project require temporary or permanent relocation and if so have comparable units been identified and costs of relocation been accurately determined? Provide a tenant relocation strategy, cost estimate and existing tenant survey to address federal Uniform Relocation Act requirements which may impact your project.

*There is no expectation of client relocation.*

- e) Describe relocation strategy for the project.

*n/a*

- f) Does the project require land use approvals such as Site Review, Annexation, Zone Change, Minor Land Partition, Demolition, or Conditional Use permits?  
*n/a*
- g) Has a pre-application been completed with the Ashland Planning Department?  
*n/a*
- h) What is the condition of any improvements on the property and what is the expected life of the property?  
*Projects will be varied in scope and conditions. The program is designed to increase the expected life of each home considerably, as well as the increased energy sustainability components implemented for each project.*
- i) Describe commitment of project funding from other sources  
*Additional funding sources include funds from the general operating budget and specific donations from the Ashland community. Donations of material and professional services is expected and commitments are agreed upon with each individual project.*

**14)** Indicate whether the project will have any negative impacts on historic or architecturally significant properties on the environment. All projects will be subjected to an Environmental Review Report and certain projects depending on scale, i.e. new construction, must undergo an Environmental Assessment.

*The program does not expect to have any negative impacts.*

**15)** Please attach any other statistical data, letters of support, applicable experience of the sponsor, evidence of financial support from other funding sources, or other material you believe will assist the City in its review of your proposal.

*See attached for letters of support.*

**16)** CDBG Application Checklist (see pages 25-26). Attach Forms A, B, & C.



**CITY OF ASHLAND**  
**2015 Program Year**  
**CDBG APPLICATION CHECKLIST**

In order to determine compliance with all applicable HUD regulations and to help to ensure that projects will be eligible for CDBG funding, the City of Ashland will need to address all HUD requirements. The purpose of this checklist is to point out areas where potential problems could arise. Obviously, this is a comprehensive list, which must evaluate a wide array of different kinds of proposals. Therefore, not every item will be applicable to every project. **Please fill it out entirely indicating all items which are not applicable and include it as part of your proposal application.**

<b>A. Applicant's Background</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Is the applicant a legal non-profit organization or unit of government?	x		
2. Do the proposed clients or users of the project meet HUD Income Guidelines (see page 10 for guidelines)?	x		
3. Does applicant have the capability to maintain written income documentation?	x		
4. Has the applicant made a legal or financial commitment to a proposed project?		x	
5. Is the applicant primarily a religious organization?		x	
6. Has the applicant administered a CDBG project previously?	x		
7. Is your agency willing and able to provide all required reports and accountability to the City as required by HUD?	x		
<b>B. Project Location and Land Use Issues</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Has a location for the project been selected?		x	
2. Is the proposed project within the Ashland City limits?	x		
3. Does the proposed project meet local zoning and land use laws?	x		
4. Are any land use permits such as a Site Review, partition, annexation or Conditional Use Permit required?		x	
5. Have these approvals been obtained?			x
6. Does the project comply with current building code requirements?	x		
7. Does the project meet handicapped accessibility requirements?	x		

<b>C. Environmental Issues</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Is the project located in the 100-year floodplain?			unknown
2. Is a wetland located on the project site?			unknown
3. Has any environmental contamination been identified on the project site?			unknown
4. Has asbestos been identified on the project site?			unknown
5. If project involves an exiting structure, was it built 1978 or earlier? If year built is known, please specify.			unknown
6. Is the proposed project located on a major arterial or near the railroad?			unknown
7. Is the proposed project located adjacent to an above ground flammable storage tank?			unknown
8. Does the proposed project involve a structure that is 50 years or older?			unknown
9. Will the applicant complete a Phase I environmental review upon receiving a CDBG award?	x		
<b>D. Labor Requirements</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Does the project involve construction over \$2,000 in cost?	x	x	
2. Will the project trigger Davis-Bacon wage requirements?		x	
3. Will the project trigger BOLI wage requirements?		x	
4. Does the project involve over \$18,703 in City awarded grants or contracts?	x		
<b>E. Displacement and Relocation</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Will tenants be displaced by the project?		x	
2. Will a business be displaced by the project?		x	
3. Will housing units be demolished or converted?		x	
<b>F. Property Data</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Does the applicant own the property by fee simple title?			x
2. Are taxes on the property current?	x		
3. Is insurance current?	x		
4. What is the current debt against the property?		x	
5. What is the current use of the property?	resident		
6. Has an appraisal on the property been conducted? If yes, what is the assessed value of the property?			x

**Form A-1**  
**To be completed for Development or Rehabilitation Proposals**

**Housing Proposals**

<b>Activity</b>	<b>Start Date</b>	<b>Completion Date</b>
<b>Site Planning &amp; Development</b>		
Option	Applicant approvals	<b>ongoing</b>
Site Acquisition		
Plan Development		
Pre-application		
Land Use Approval		
Construction Plans		
Final Bids		
Contractor Selection		
Building Permits	As needed	<b>Ongoing</b>
<b>Grant applications</b>		
local		
state		
federal	Feb. CDBG	
Non-government	Thrivent	Per identified project
other		
<b>Loan Applications</b>		
Construction loan		
Permanent		
<b>Construction Phase</b>		
Construction	<b>ASAP- ongoing</b>	<b>June 30, 2016</b>
Certificate of Occupancy	<b>Will depend on project</b>	<b>All completed by June 30, 2016</b>

*Please provide your best (realistic) date estimates regarding the project schedule*

**Form A-2**  
**To be completed for Social Service Proposals**

**Social Services Proposals**

<b>Activity</b>	<b>Start Date</b>	<b>Completion Date</b>

**Social service providers should list key benchmarks in the table above for their proposed projects (IE hire of personnel, application for further funding, initiation of direct client services, etc)**

**Form B-1**  
**To be completed for Development or Rehabilitation Proposals**

**Uses of Funding**

**Housing Proposals**

	<b>Total Cost</b>	<b>CDBG Request</b>	<b>Other Source(s)</b>
<b>Acquisition Costs</b>			
Land	0	0	0
Improvements	71500	61500	10000
Liens and other Taxes	0	0	0
Closing costs	1500	1500	0
Off-Site costs			0
Other			0
<b>SUBTOTAL</b>	<b>73000</b>	<b>63000</b>	<b>10000</b>
<b>Development Costs</b>			
Land Use Approvals	0		
Building Permits/fees (Include Engineering and Community Development Fees)	2000	2000	0
System Development Charges (SDCs)	0	0	0
Relocation Costs	0	0	0
Environmental Report / Lead Based Paint Clearance	1000	1000	0
Soils Report	0	0	0
Survey	0	0	0
Marketing	1500	0	1500
Insurance	2500	2500	0
Other	0	0	0
<b>Fees</b>			
Architectural/Engineering	0	0	0
Legal/Accounting	0	0	0
Appraisals	0	0	0
Lender fees	0	0	0
Construction Loan	0	0	0
Permanent Loan	0	0	0
Tax Credit Fees	0	0	0
Developer Fee	0	0	0
Consultant Fee	0	0	0
Other-Salary	15000	10000	5000
<b>TOTAL</b>	<b>100000</b>	<b>83500</b>	<b>16500</b>

**Form B-2**  
**To be completed for Social Service Proposals**

**Social Service Proposals**

	<b>Total Cost</b>	<b>CDBG Request</b>	<b>Other Source(s)</b>
<b>Direct Client Services</b>			
Wages (of personal providing direct client services)			
Materials/Supplies			
Marketing/Outreach			
<b>Program Administration</b> Includes overhead and general staffing necessary to administer the program (accounting, management, grant administration) but that does not provide direct benefits to the client.		<b>CDBG Funds are not available for program administration</b>	
<b>Total Project Cost</b>			

**Form C**

**SOURCE(S) OF FUNDS FOR OPERATING EXPENSES WORKSHEET**

Completeness of this worksheet establishes the capacity of the organization to sustain the operations of the program(s).

<b>Sources</b>	<b>Secured</b>	<b>Conditional</b> (awarded with conditions)	<b>Tentative</b>	<b>Commitment Date</b>
Federal Grants	<b>83,500</b>	<b>City of Ashland</b>	x	
State Grants				
Local Grants				
Non Governmental Grants	<b>7500</b>		x	<b>Based upon applicant approval</b>
Donations/Gifts	<b>4000</b>	<b>Based on history</b>		
Applicant Contribution	<b>5000</b>			<b>General fund</b>
Program Income				
Loans				
Other (specify)				
Other (specify)				
<b>TOTAL</b>	<b>100000</b>			

Please provide a description the timeline of loan and grant application dates as related to the proposed project. Specifically, for any tentative funding sources please provide application dates, award dates and funding availability dates.

The repair project in Ashland is dependent upon the approval of the Ashland 2015 CDBG funding.

A commitment of funding from Thrivent Financial has been verbally given depending on the

Program moving forward. Donations of services and material is based on the expectations

Of past history.

**Form D**  
**DISCLOSURE OF INTERESTS**

To assist the City of Ashland in determining whether there may be a potential conflict of interest related to the expenditure of Community Development Block Grant funds we request the following information be provided by applicants:

ORGANIZATION NAME:

Organization is: \_\_\_\_\_  
1. Corporation ( )  
2. Non-Profit 501C3 ( x )  
3. Partnership ( )  
4. Sole Owner ( )  
5. Association ( )  
6. Other ( ) \_\_\_\_\_

**DISCLOSURE QUESTIONS**

If additional space is necessary, please attach a separate sheet.

1. State the names of each "employee" of the City of Ashland having a financial or personal interest in the above mentioned "organization" or project proposed.

Name, Job Title and City Department

n/a

2. State the name(s) of any current or prior elected or appointed "official", of the City of Ashland having a potential "financial interest" in the organization or project.

Name/Title

n/a

3. Provide the names of each "board member" of the Organization seeking CDBG funding Name Board, Commission, or Committee (may be attached as a separate Sheet)

1 Bruce Conway, Board President

2 Jim Servoss, Vice President

3 Robert Boggess, Secretary

4 Lois Nobles-Butler, Treasurer

5 Paul Bloom, Director

6 John Ford, Director

7 Ruth Cowan, Director

8 Eugene Miller, Director

9 Trey Burkey

10 \_\_\_\_\_

11 \_\_\_\_\_

12 \_\_\_\_\_

additional \_\_\_\_\_

If the applicant has provided names in question 1 or 2, please provide details regarding any known potential conflicts of interest in an attached narrative.



February 18, 2015



Subject: Letter of Recommendation Habitat for Humanity Ashland

To whom it may concern,

It is with great thanks and appreciation that I am writing this letter regarding the amazing work being done in our community by Habitat for Humanity in Ashland Oregon. As a Manager at Ashland General Hardware I have known Sherri Vitaris and Dan Thomas professionally for over twenty years. Their work is exceptional and there is a tremendous need for Critical Home Repair in the local area. We at the hardware store consider it a pleasure to work with them by providing discounted products as well as volunteers from our staff and community network.

Sincerely,

Cathy Trower  
Ashland General Hardware  
249 A Street  
Ashland OR 97520



To Whom It Concerns

I am proud to volunteer our support to Rogue valley Habitat for Humanity for the exemplary and tireless services they provide to raise money, organize labor, services and materials in order to build much needed housing for those less fortunate but hard working people in our community. I have personally worked with Denise James, Director of Rogue valley Habitat, on many such projects and I can't say enough for all that she and her staff do, and their compassionate and professional manner. I am honored to be able to assist in their goals to continue to help people help themselves to achieve the dream of home ownership, when unfortunate events in their lives would otherwise have made such a dream unattainable.

Please join me in supporting Rogue valley Habitat for Humanity's endless efforts on behalf of the many beneficiaries in our community.

Sincerely

*Gerald Gray*

Gerald Gray

Southern Oregon Director of Operations

Solar For All Inc.

632 Schroeder Lane

Grants Pass, Or. 97527

971-300-1001

FEB 20 2015



Community Development Block Grant

Application

March 2015

## Special Needs Residential Home Remodel, Narrative Summary

Full Project Cost: \$ 130,000

Amount Requested from CBBG: \$ 99,000

Ashland Supportive Housing and Community Outreach (ASH), a 501(c)3 private nonprofit corporation, is requesting Community Development Block Grant funds to rehabilitate and upgrade an existing 24 Hour Residential Home for adults with intellectual and developmental disabilities (I/DD). ASH has provided residential and support services for people with I/DD in the community since 1982. This facility is a single family residential home in an Ashland neighborhood that houses five adults. It was purchased by ASH in 2005 and is owned without encumbrances. All of the residents in the home are considered to be extremely low-income, and require staff available 24/7. Several of the residents have been provided housing with ASH since 1982; three have significant mobility issues requiring a walker and/or wheelchair. Any available openings are filled by individuals with I/DD by referral process through Jackson County Developmental Disability Services, who verifies disability and income. ASH is dedicated to providing this special needs housing for extremely low income adults in perpetuity.

The proposed project has three parts:

- 1. Replace existing cracked, concrete driveway and crumbling back patio and add new, more level walkway from the rear exit of the house to the curb.** The driveway has a significant upward slope and is currently very cracked and uneven, making navigation by residents difficult. The back patio is crumbling and is of a gravel like consistency. Residents and visitors with mobility issues are not currently able to access the back yard or sitting areas due to the instability of this surface. This part of the project would replace the deteriorating concrete driveway and patio and add an additional walkway from the rear of the house to the curb at a significantly reduced and more easily navigated slope.
- 2. Replace existing, non-permitted and nonconforming laundry room while expanding square footage of the living space.** The existing laundry room is an addition to the back of the house, existing at purchase in 2005. It is not constructed on footings, causing the walls to absorb moisture. As part of this needed repair, ASH is proposing that at the same time a section of the exterior wall be extended outward by 10 feet to create room in the communal dining and living areas. This will be an increase from 485 to 755 square feet. As residents age in place they face increasing mobility issues; some now use



walkers and need assistance to move about their home. More space is necessary to provide free access without tripping hazards. Also, as people age and as State funded day programs are cut people are home more, and present in the main living areas of the house a majority of the day.

- 3. Installation of a solar power system.** This facility uses more than the average household for electricity and water. As energy costs continue to grow, revenue from state contracts do not keep pace. This installation proposes to generate 85% of the current utility costs. The addition of solar power will enhance the financial stability of the agency and provide the positive example of green energy use.

ASH is proposing the above three pieces as one project as there will be significant cost savings in doing all three at once.

The ownership entity is Ashland Supportive Housing and Community Outreach. The agency contact person is:

Judy Beyer, Assistant Director  
PO Box 3536  
693B, Washington St  
Ashland, Oregon 97520  
Phone: 541-488-2870  
Fax: 541-488-2682  
Email: [ashinc@ashlandoreon.org](mailto:ashinc@ashlandoreon.org)





**CITY OF ASHLAND**  
**2015 Program Year Community Development Block Grant (CDBG)**  
**Application**

**These completed Sheets shall be included as the first pages on all submittals.**

**I. APPLICANT INFORMATION**

**Applicant Organization Name:**

**Ashland Supportive Housing and Community Outreach**

**Executive Director's Name(s): Sue Crader**

**Board Member Names (attach separate sheet)**

**Applicant Mailing Address:** PO Box 3536, Ashland, Oregon 97520

**Applicant Street Address:** 693B Washington St., Ashland, Oregon 97520

IRS Classification: 501(c) 3 Private Nonprofit Corporation

Federal Tax ID#: XXXXXXXXXX

Mission Statement: (may be attached)

**The ASH Board and Staff support persons with disabilities to live a rich, fulfilling and productive life with dignity and respect.**

Total Employees:   36   Total Volunteers:   14

**II. CONTACT PERSON** (designate a contact person who is familiar with the project)

Name: **Judy Beyer**  
Title: **Assistant Director**  
Phone Number: **(541) 488-2870**  
Fax Number: **(541) 488-2682**  
E-mail Address: **ashinc@ashlandoregon.org**

**III. PROJECT INFORMATION SUMMARY**

Project Name or Title: **Special Needs Residential Facility Remodel**

Expected Completion Date: December, 2015

Requested CDBG Funds:	\$99,000
Organizational Match:	\$13,000
Funds from Other Sources:	\$18,000
Total Project Cost:	\$130,000

**Application Contents**

A complete proposal shall include a brief narrative summary on applicant letterhead, full project cost, all federal, state and local subsidies requested for the project, proposed ownership entity, phone number and mailing address of contact person for the designated non-profit or certified Community Housing Development Organization.

**Provide the information listed below numbered and in the order listed so that we can find the required information easily and award full credit for your responses. If the question does not apply to the proposed project write N/A.**

**1) Complete Application Form (see page 16).**

Enclosed

**2) A project summary including a brief description, project background and a list of project objectives**

Ashland Supportive Housing owns a residence that provides housing for five extremely-low income adults with developmental disabilities at 842 Michelle Avenue in Ashland Oregon. When the home was purchased in 2005, the area in back of the house, which faces west, was unprotected and had drainage issues. It was muddy in winter and hot in summer. ASH remedied the issue of protecting the western face of the house with a patio deck, arbor, and planters in 2005 and added a French drain for the back yard. At this time ASH also modified the home for accessibility by adding concrete ramps to the front and side entrances and enlarging a bathroom to fit a walk-in shower and wheelchair access. The goal was to outfit the home to allow residents to age in place.

In the ten years since the house was purchased and remodeled a number of issues have arisen:

- The concrete patio in back that was added in 2005 is now breaking apart; residents with mobility issues can no longer walk on it.
- The driveway, which has a significant slope, has cracks that are worsening rapidly making it difficult to impossible for some to navigate.
- The laundry room has moisture damage in the walls and needs to be demolished, with a new room constructed on the same level as the rest of the home. It currently extends onto the back patio; this room was an addition to the main house and was built on a concrete pad, not on footings, and on a different level than the rest of the house. This resulted in a step down that is too difficult for residents to navigate and is currently not used as a safety exit.
- The home needs an exit to the backyard with a ramp that is safe for all residents to use, utilizing the side of the property that has significantly less slope.
- Additionally, when this home was purchased all residents had either work or State funded day services out of the home for five (5) hours per day. Day services have closed in the last year, and due to the Employment First mandate by the State, those residents who have worked in the past have seen their hours cut back to 2-3 hours per day. The communal living areas are now too small as most residents are present for a majority of the day.
- The cost of electricity rises every year without a concurrent cost of living increase from the State on a regular basis; this uses up more of our operating funds and leaves less for client services. Additionally as residents are in the home more hours of the day more electricity is used. ASH has determined that this increase is approximately 24% since 2010.

The remodel needs can be remedied with a single demolition of the laundry room and concrete patio and remodel of the west face to extend out a section of the wall to create more living space (drawings are included with this application).



We are requesting three major improvements:

- 1. Replace existing cracked, concrete driveway and crumbling back patio and add new, more level walkway from the rear exit of the house to the curb.** The driveway has a significant upward slope and is currently very cracked and uneven, making navigation by residents difficult. The back patio is crumbling and is of a gravel like consistency. Residents and visitors with mobility issues are not currently able to access the back yard or sitting areas due to the instability of this surface. This part of the project would replace the deteriorating concrete driveway and patio and add an additional walkway from the rear of the house to the curb at a significantly reduced and more easily navigated slope.
- 2. Replace existing, non-permitted and nonconforming laundry room while expanding square footage of the living space.** The laundry room was an addition to the back of the house, existing at purchase in 2005. It was not constructed on footings, causing the walls to absorb moisture. As part of this needed repair, ASH is proposing that at the same time a section of the exterior wall be extended outward by 10 feet to create room in the communal dining and living areas. This will be an increase from 485 to 755 square feet. As residents age in place they face increasing mobility issues; some now use walkers and need assistance to move about their home. More space is necessary to provide free access without tripping hazards. Also, as people age and as State funded day programs are cut people are home more, and present in the main living areas of the house a majority of the day.
- 3. Installation of a solar power system.** This facility uses more than the average household for electricity and water. As energy costs continue to grow, revenue from state contracts do not keep pace. This installation proposes to generate 85% of the current utility costs. The addition of solar power will enhance the financial stability of the agency and provide the positive example of green energy use.

The first two of these improvements would dramatically improve safety for our residents. The solar collection system would save ASH over \$2500 in electrical costs over the course of a current year. Savings of this nature will help move ASH and the entire community into the greening of the 21<sup>st</sup> century.

- 3) Property and Project Information relating to acquisition, rehabilitation, site clearance, and development (*section not applicable for social service applications involving direct services to qualified low- or extremely low- income persons*)**

The house we own at 842 Michelle Ave is in the Old Helman Ranch subdivision. It was built in 1979, and has been remodeled at some time before we purchased it in 2005. It has five (5) bedrooms and sits on a 9000 sq. ft. lot near the edge of the subdivision. It is on a single level and has concrete ramps to front and side doors. The back (west side) is not handicap accessible due to the deteriorating surface of the concrete patio. Three of the five residents have lived in the house for 10 years, and we hope that the other two will stay with us long term as well. They like the

neighborhood, especially as it is within walking distance of our other two agency group homes. It is quiet and the neighbors are friendly. The house is in good condition.

The existing house has a House Manager's office; communal living and kitchen area; five (5) bedrooms; two (2) indoor storage areas; 108 sq. ft. laundry room; and two (2) bathrooms.

The dimensions of the project area are:

- Lot size: 9000 sq. ft.
- Existing house: 1840 sq. ft.
- Proposed house: 2140 sq. ft.
- Existing living and laundry space: 485.5 sq. ft.
- Proposed living and laundry space: 755.5 sq. ft.

Provide a map showing the project's location. If the project will serve a specific area, proposed project boundaries should be shown.

Map provided in attachments

Describe details regarding any property proposed for acquisition, indicating the following:

N/A

a) Property location relative to jobs, schools, transportation, shopping and services

N/A

b) Total floor area of buildings, and size of land site

N/A

c) Types of residential units, number of each type unit, and total number of bedrooms

N/A

d) Number of extremely-low, low-, and moderate-income units proposed

N/A

e) Number of units accessible to the disabled

N/A

- f) Square footage of units and description of amenities such as private balconies or storage areas  
N/A
- g) Square footage of common areas such as community or laundry rooms  
N/A
- h) Square footage of commercial space, if any  
N/A
- i) Year property was built. If pre-1978, will it be occupied by children under the age of six?  
N/A
- j) Describe condition of any existing housing proposed for acquisition and any alterations planned. Briefly discuss the total cost of the proposal relative to new construction.  
N/A
- k) If the project involves rehabilitation attach a description of the work to be completed.

This project proposes to remodel an existing five bedroom home that houses five developmentally disabled adults, all of whom are extremely-low income.

The house was built in 1979. It is a single family home, single level that was remodeled sometime previous to our purchase in 2005 to create five bedrooms. We have done extensive retrofitting for our purposes. The property has also been significantly improved with a fire suppression system, an extra bathroom, concrete ramps and landscaping. It was thoroughly inspected by Don King of World Inspection Network at the time of purchase. Other than some general repairs, the problem of inadequate exterior drainage was addressed with a French drain installed at the same time that the concrete patio was laid. Ashland Supportive Housing strives to maintain all of our homes in excellent condition as far as weatherization and attractiveness. Roof and siding are in excellent condition. The residents are happy there and well established in the neighborhood. The cost of the rehabilitation we are proposing now stands at \$130,000. New construction or moving are neither affordable nor desirable at this time.

The rehabilitation includes five major areas:

1. Renovate the laundry room
2. Push the back wall of the living area out ten (10) feet.
3. Pour new concrete for the patio deck and driveway as both have failed

4. Pour a new walkway to run around the house from the back to the street
5. Install solar electrical panels on the roof to assist with utility expenses

The concrete patio and old laundry room will be demolished. The area to become a foundation for the new living area will be excavated. The existing arbor will be disassembled and saved for use later. New walls will be erected for the laundry room and living area. The total proposed area increase will be 270 sq ft. There will be a new roofline, and changes to plumbing and the fire suppression system. Egress from the back of the building will become accessible to people with mobility issues. In case of fire exit from the back of the building, people will be able to get around the building and out to the street on a firm walkway. Preliminary drawings are included in this application.

- l) Describe the target population. Include the suitability of the property for the target population, the tenant selection process, brief description of any residential services and the resources identified to fund the services.

The target population is developmentally disabled adults who require support services 24 hours per day and assistance with all activities of daily living. Eligibility is determined by the State of Oregon through Jackson County Developmental Disability Services. Persons found eligible are given a Needs Assessment Survey, which determines what supports are needed and the level of ongoing funding for these supports that will be provided by the state. When there is an opening, referrals are sent to ASH from Jackson County DD Services, which are then screened for an appropriate match with current residents. The applicant then visits the home, meets the current residents, and makes the final decision to accept placement. This property is felt to be suitable for the proposed use as it has served as a residential facility for developmentally disabled adults since 2005. It was inspected and licensed by the State of Oregon at opening, and is reinspected every two (2) years. The home is single story; fenced; has a fire suppression system in place; is conveniently located in relation to city services; and has a long and well established place in the neighborhood as a home for adults with disabilities.

- m) Indicate how many years the property will remain affordable and the mechanism that will be used to ensure the affordability period.

Ashland Supportive Housing is licensed as a 24 Hour Residential facility for Adults with Developmental Disabilities through the State of Oregon Department of Human Services. We have served in this capacity since 1981. We are firmly established in the community, and we expect to continue operations at least 60 years as residential services will continue to be needed by this population. We are the only agency providing this service in Ashland, and as such we expect to continue providing services. The house at 842 Michelle Avenue is wholly

owned by Ashland Supportive Housing and all rehabilitation is being done with the expectation that the current use will continue for the full affordability period. This use is by its very nature to supply housing to low income adults.

- 4) Briefly describe the services to be provided, if any, and describe the eligible target population receiving direct benefit from these services (low-income, homeless, special needs).

The facility to be remodeled is a residential home with 24 hour support staff for special needs adults with intellectual and developmental disabilities. All residents are extremely low income, and need assistance with all activities of daily living, which includes help with personal hygiene, meal preparation, laundry services, administering medication, and other support services. Currently, two residents use walkers, and a third needs hands-on assistance ambulating. None are able to access the community independently. The age range of current residents is from 30 to 78 years of age. Residents are invited to stay for their lifetime; the home has been remodeled to remove architectural barriers in order to allow aging in place.

- 5) A work program and time line including a complete list of tasks with estimated start and completion of each task (please complete attached Form A – Project Schedule).

See Form A – Project Schedule

- 6) Financial Information  
A budget describing total cost, cost per task, existing (secured) project funds and unfunded costs. Identify any and all source(s) of funding. This would include other Federal and State grants and loans, monetary donations, in-kind contributions, volunteer labor, donation of materials and supplies, etc. In addition to addressing the questions below please complete attached Form B – Uses of Funding & Form C – Sources of Funding.

See attached project budget and detailed construction bids.

Provide a detailed financial description of the proposed project, including Rent Schedule, Sources/Uses of Funding and Operating Budget Income/Expense, and utility allowances

See attached operating budget.

- a) Describe the assumptions used to determine the total project cost. Indicate the sources consulted and how costs were determined.

We have had construction estimates from three general contractors:

1. Innovative Construction of Oregon
2. Golden Fields Construction and Design
3. Hamlett Construction Company

Additionally we have consulted with two companies that install concrete:

1. Cut 'N Break Construction
2. Josh Bong Construction

We have a current estimate from Pacific Fire Protection to add to the existing fire suppression system.

TruSouth solar has provided the estimate for solar installation.

- b) Was consideration given to remaining economic life of the property and potential cost increases such as unanticipated repair or relocation costs? Maintenance costs? Operating costs?

*(Not applicable for social service applications involving direct services to qualified low- or extremely low- income persons)*

The needs of this project were determined by the necessity to renovate the property in order to extend its economic life and prevent future major repairs. The residence is considered to have as long a life, if not more so, than other, similar residential properties. There will be no relocation costs. See attached budget for operating costs, which includes maintenance and repair. Currently, maintenance costs are covered through the ASH agency budget. Operating costs have been determined by the past ten (10) years of utility and maintenance costs on the property, and payroll, benefit and other operating costs as currently incurred in all programs managed by ASH.

- c) Describe the financial assumptions used to develop the operating budget. Include projected rent increases, other sources of income for operation and maintenance expenses, and inflationary factors. For social service award requests please include financial assumptions relating to increases in wages, materials and overhead, or other costs associated with the proposed activity.

ASH has been a provider of residential services for adults with developmental disabilities since 1982. Financial assumptions are based on experience during this time. The State of Oregon conducts a needs assessment survey on all individuals accepted for services. This survey

determines the rate that is paid to provider organizations for the cost of care, which includes staffing, facility, and administrative costs. In addition, residents pay room and board to the provider organization at an amount that is determined by the State of Oregon. This rate is currently set at \$570.00 per month per individual. ASH uses these known funds to set the operating budget for the agency. If additional exceptional needs arise, ASH seeks funds from other sources through grants and fundraising. ASH maintains a reserve fund and insurance to in order to maintain the integrity of the residences should a catastrophic emergency arise.

- d) Discuss non-typical expenses or those outside industry standards.

None known at this time.

- e) Attach letters of funding commitment from other sources, if available.

Matching grants are in process.

- f) Will a property tax exemption be requested for the project? If so, what is the estimated dollar value of the tax exemption over the twenty-year period? Please briefly detail the calculation method used to estimate the value and the process your organization would undertake to obtain the exemptions or appraised value adjustment.

The property involved currently has tax exempt status which will remain in place. To determine the estimated dollar value of the continuation of the current tax exemption over the next twenty-year period we consulted with the Jackson County Assessors' Office. With a current Maximum Assessed Value of \$179,950 and adding a 3% increase per year for twenty years, the dollar value of the tax exemption over a twenty year period is \$44,723.

*(Not applicable for social service applications involving direct services to qualified low- or extremely low- income persons)*

- 7) Eligibility for Federal Funding  
Will any of the following activities be part of the proposed project?

- Property Acquisition            No
- New Construction            (non-residential)            No
- Removal of Architectural Barriers            Yes
- Rehabilitation Costs            Yes
- Development Costs            No
- Client Services            No

- Specification Preparation (Construction/Rehab) Yes
- Relocation Benefits (if required) No
- Appraisal (for acquisitions) No

Federal funding has certain regulatory requirements. The following information is required to determine eligibility for federal funding.

### General Information

- a) Is the proposed project within the Ashland City limits? If not, explain.

Yes

- b) Specify the proposed tenant or client income level; state in terms of percentage below area median for the Medford-Ashland standard metropolitan statistical area (MSA). The current income guidelines are included on page 10 above.

Tenants are presumed to be persons of principally low incomes per HUD guidelines as they are all diagnosed with a developmental disability.

- c) Describe any financial or legal commitments made to the project.

There are currently no financial or legal commitments made to the project.

### Housing Development, Land Acquisition, or Rehabilitation Specific Information

- d) Will permanent housing units be converted or demolished? If so, how many?

N/A

- e) Is the proposed housing site located in a 100-year flood plain?

No

- f) Has a Level 1 environmental assessment been done for the site? If yes, attach the report.



This rehabilitation does not require an environmental assessment. Evaluation will be done for any demolition materials that may contain asbestos by Neilson Research Laboratories. The building was built after 1978, so no lead paint would have been used in construction. All codes and ordinances will be adhered to.

g) Is the proposed housing site located adjacent to a major arterial road or near a railroad?

No

h) Is the proposed site located adjacent to an aboveground flammable storage tank?

No

i) Will the proposed project impact historic features? If yes, explain.

No

**8)** Briefly describe the agency's mission and service history. The City may request copies of the agency's financial audit or review for the last two years prior to contract signing in order to determine agency's capability to successfully complete the project.

The ASH Board and Staff support persons with disabilities to live a rich, fulfilling, and productive life with dignity and respect. ASH has been helping people with developmental disabilities function in Ashland's community and assisting our clients to engage in work and hobbies since 1982. We provide support at home and in the community for our clients' individual needs while also encouraging independence. The agency currently has 26 full time employees and 10 part time or temporary staff. ASH has been able to negotiate rates with the State of Oregon and manage income in order to provide a living wage for all regular staff, which includes fully compensated medical and dental benefits.

**9)** Will the project promote self-sufficiency for extremely low-, low-moderate-income families, or individuals with special needs?

As a provider of supportive services, ASH has always encouraged our residents to be independent within their capabilities. This home will continue to encourage residents to be

independent to their best of their ability, while also providing support where it is needed. It should be noted that through the needs assessment process by the State that each resident or applicant for housing has been determined to require support services on a 24 hour basis.

**10)** Please identify how your project benefits extremely low-, low- and moderate-income individuals or individuals with special needs.

- a) For proposed projects serving a low-income area (i.e. public facility improvements, community center or other neighborhood serving facility), provide the following data, including documentation of the sources of information for the following statistics:
- Number of extremely low-, low- and moderate-income individuals served in the project area on an annual basis.
  - Total number of individuals served in project area on an annual basis.

N/A

- b) For proposed projects serving a target population (i.e. homeless families, battered women, people with AIDS, special needs populations, etc.) provide the following data, including document sources of information for statistics.

- Specify the target population to be served.

Developmentally disabled adults

- Number of low and moderate-income individuals in target population to be served on an annual basis. (This count cannot include repeated visits or use by the same individuals.)

5

- Total number of individuals in target population to be served on an annual basis.

5

- Percent low and moderate income.

100%

- 11) Briefly describe how your proposal will ensure that moderate income individuals do not benefit to the exclusion of extremely-low or low-income individuals.

All individuals admitted to 24 Hour Residential services are developmentally disabled and have as their primary income source Social Security and/or Supplemental Security Income. This class by HUD definitions is considered to be extremely-low income.

- 12) Indicate if you expect the project to cause low and moderate income housing to be demolished or converted to another use (see attachment "Relocation Strategy Guidance"). If so, explain.

N/A

- 13) Project Feasibility  
Please describe your readiness to proceed concerning whether land use issues have been resolved and whether your organization has the administrative capacity to complete the project proposed.

Describe the feasibility of the project:

- a) Does the applicant have the experience and capacity to complete and or manage the project proposed? Briefly describe applicants capacity and experience in providing, maintaining and managing housing, particularly low income housing similar to the proposed project.

Ashland Supportive Housing has been managing homes for developmentally disabled adults since 1982. ASH has purchased, remodeled for accessibility, and moved our clientele into three group homes in the Quiet Village area of Ashland over the last ten years. This move in operations was undertaken due to our clients growing older and developing greater needs for accessible housing in order to age in place. All three homes were remodeled for this purpose. Our fifteen residents are now housed in those three homes still under our care and supervision. We consider ourselves well qualified to provide, maintain and manage homes for the developmentally disabled.

- b) Are the ongoing operating expense and maintenance reserve estimates reasonable?

Yes. ASH has successfully operated residential homes in the Ashland community since 1982. Ongoing operating expenses are determined by 33 years of experience. ASH maintains an emergency reserve fund in order to ensure that no disruptions in service will occur.

- c) Does the applicant have a purchase option on the property, letter of support from the property owner(s), or some other assurance that the property is available for acquisition?

The property is owned free of encumbrances by Ashland Supportive Housing.

- d) Does the project require temporary or permanent relocation and if so have comparable units been identified and costs of relocation been accurately determined? Provide a tenant relocation strategy, cost estimate and existing tenant survey to address federal Uniform Relocation Act requirements which may impact your project.

Relocation will not be needed.

- e) Describe relocation strategy for the project.

N/A

- f) Does the project require land use approvals such as Site Review, Annexation, Zone Change, Minor Land Partition, Demolition, or Conditional Use permits?

No land use approvals are needed.

- g) Has a pre-application been completed with the Ashland Planning Department?

A pre-application is not necessary for this project. No Land Use approval is required.

- h) What is the condition of any improvements on the property and what is the expected life of the property?

Improvements are all in good condition except for the concrete patio at the back (west side). We have a fire suppression system which is inspected annually. Bathrooms and kitchen are in good condition. Concrete ramps are ten (10) years old and in good condition. Exterior paint is

one year old. Windows were all replaced at the time of purchase ten (10) years ago. The insulation and ducting were repaired in 2006 along with sealing of all doorways. The water heater is less than ten (10) years old, but the furnace is of unknown age as it came with the house. The roof was torn off and replaced in 2008. The landscaping is irrigated and maintained with annual inspection of valves and sprinklers. The staff inspect the house monthly for safety hazards. We expect this house (and all of our houses) to serve us for a minimum of another sixty (60) years.

i) Describe commitment of project funding from other sources

Ashland Supportive Housing's proposed match has been set aside. Application for a Carpenter Foundation grant for \$18,000 is in process for a portion of the costs of the solar energy system.

- 14)** Indicate whether the project will have any negative impacts on historic or architecturally significant properties on the environment. All projects will be subjected to an Environmental Review Report and certain projects depending on scale, i.e. new construction, must undergo an Environmental Assessment.

There will be no negative impacts on historic or architecturally significant properties or the environment.

- 15)** Please attach any other statistical data, letters of support, applicable experience of the sponsor, evidence of financial support from other funding sources, or other material you believe will assist the City in its review of your proposal.

Please see attached photographs of the areas to be remodeled. Also attached are the leading, lowest bids for the work to be done.

- 16)** CDBG Application Checklist (see pages 25-26). Attach Forms A, B, & C.

**CITY OF ASHLAND**  
**2015 Program Year**  
**CDBG APPLICATION CHECKLIST**

In order to determine compliance with all applicable HUD regulations and to help to ensure that projects will be eligible for CDBG funding, the City of Ashland will need to address all HUD requirements. The purpose of this checklist is to point out areas where potential problems could arise. Obviously, this is a comprehensive list, which must evaluate a wide array of different kinds of proposals. Therefore, not every item will be applicable to every project. **Please fill it out entirely indicating all items which are not applicable and include it as part of your proposal application.**

A. Applicant's Background	Yes	No	N/A
1. Is the applicant a legal non-profit organization or unit of government?	X		
2. Do the proposed clients or users of the project meet HUD Income Guidelines (see page 10 for guidelines)?	X		
3. Does applicant have the capability to maintain written income documentation?	X		
4. Has the applicant made a legal or financial commitment to a proposed project?		X	
5. Is the applicant primarily a religious organization?		X	
6. Has the applicant administered a CDBG project previously?	X		
7. Is your agency willing and able to provide all required reports and accountability to the City as required by HUD?	X		
B. Project Location and Land Use Issues	Yes	No	N/A
1. Has a location for the project been selected?	X		
2. Is the proposed project within the Ashland City limits?	X		
3. Does the proposed project meet local zoning and land use laws?	X		
4. Are any land use permits such as a Site Review, partition, annexation or Conditional Use Permit required?		X	
5. Have these approvals been obtained?			X
6. Does the project comply with current building code requirements?	X		
7. Does the project meet handicapped accessibility requirements?	X		

<b>C. Environmental Issues</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Is the project located in the 100-year floodplain?		X	
2. Is a wetland located on the project site?		X	
3. Has any environmental contamination been identified on the project site?		X	
4. Has asbestos been identified on the project site?		X	
5. If project involves an existing structure, was it built 1978 or earlier? If year built is known, please specify.		X 1979	
6. Is the proposed project located on a major arterial or near the railroad?		X	
7. Is the proposed project located adjacent to an above ground flammable storage tank?		X	
8. Does the proposed project involve a structure that is 50 years or older?		X	
9. Will the applicant complete a Phase I environmental review upon receiving a CDBG award?			X
<b>D. Labor Requirements</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Does the project involve construction over \$2,000 in cost?	X		
2. Will the project trigger Davis-Bacon wage requirements?		X	
3. Will the project trigger BOLI wage requirements?		X	
4. Does the project involve over \$18,703 in City awarded grants or contracts?	X		
<b>E. Displacement and Relocation</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Will tenants be displaced by the project?		X	
2. Will a business be displaced by the project?		X	
3. Will housing units be demolished or converted?		X	
<b>F. Property Data</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Does the applicant own the property by fee simple title?	X		
2. Are taxes on the property current?	X		
3. Is insurance current?	X		
4. What is the current debt against the property? \$0.00			X
5. What is the current use of the property? <b>Low income special needs housing</b>			
6. Has an appraisal on the property been conducted? If yes, what is the assessed value of the property? \$266,530	X		

**Form A-1 To be completed for Development or Rehabilitation Proposals**

**Housing Proposals**

<b>Activity</b>	<b>Start Date</b>	<b>Completion Date</b>
<b>Site Planning &amp; Development</b>		
Option	N/A	
Site Acquisition	N/A	
Plan Development		<b>02/2015</b>
Pre-application	N/A	
Land Use Approval	N/A	
Construction Plans		<b>02/2015</b>
Final Bids		<b>02/2015</b>
Contractor Selection		<b>07/2015</b>
Building Permits		<b>07/2015</b>
<b>Grant applications</b>		
local		
state		
federal	<b>02/2015</b>	<b>07/2015</b>
Non-government	<b>04/2015</b>	<b>07/2015</b>
other		
<b>Loan Applications</b>		
Construction loan	N/A	
Permanent	N/A	
<b>Construction Phase</b>		
Construction	<b>Upon receipt of funds</b>	<b>12/2015</b>
Certificate of Occupancy	N/A	<b>12/2015</b>

*Please provide your best (realistic) date estimates regarding the project schedule*



**Form B-1**  
**To be completed for Development or Rehabilitation Proposals**

**Uses of Funding Housing Proposals**

	<b>Total Cost</b>	<b>CDBG Request</b>	<b>Other Source(s)</b>
<b>Acquisition Costs</b>			
Land	N/A		
Improvements	\$127,000		
Liens and other Taxes	N/A		
Closing costs	N/A		
Off-Site costs	N/A		
Other	N/A		
<b>SUBTOTAL</b>	<b>\$127,000</b>	<b>\$99,000</b>	<b>\$28,000</b>
<b>Development Costs</b>			
Land Use Approvals	N/A		
Building Permits/fees (Include Engineering and Community Development Fees)	\$3,000	-0-	ASH Match
System Development Charges (SDCs)	N/A		
Relocation Costs	N/A		
Environmental Report / Lead Based Paint Clearance	N/A		
Soils Report	N/A		
Survey	N/A		
Marketing	N/A		
Insurance	Existing coverage		
Other	N/A		
<b>Fees</b>			
Architectural/Engineering	N/A		
Legal/Accounting	N/A		
Appraisals	N/A		
Lender fees	N/A		
Construction Loan	N/A		
Permanent Loan	N/A		
Tax Credit Fees	N/A		
Developer Fee	N/A		
Consultant Fee	N/A		
Other	N/A		
<b>TOTAL</b>	<b>\$130,000</b>	<b>\$99,000</b>	<b>\$31,000</b>

**Form C**

**SOURCE(S) OF FUNDS FOR OPERATING EXPENSES WORKSHEET**

Completeness of this worksheet establishes the capacity of the organization to sustain the operations of the program(s).

<b>Sources</b>	<b>Secured</b>	<b>Conditional</b> (awarded with conditions)	<b>Tentative</b>	<b>Commitment Date</b>
Federal Grants			<b>\$99,000</b>	<b>08/2015</b>
State Grants				
Local Grants				
Non-Governmental Grants			<b>\$18,000</b>	<b>07/2015</b>
Donations/Gifts				
Applicant Contribution	<b>\$13,000</b>			
Program Income	<b>N/A</b>			
Loans	<b>N/A</b>			
Other (specify)	<b>N/A</b>			
Other (specify)	<b>N/A</b>			
<b>TOTAL</b>	<b>\$13,000</b>		<b>\$112,000</b>	

Please provide a description the timeline of loan and grant application dates as related to the proposed project. Specifically, for any tentative funding sources please provide application dates, award dates and funding availability dates.

Community Development block grant funds applied for 02/20/2015. Award date will be by 07/2015, with availability by September, 2015.

---

The application for Carpenter Foundation funds is due on April 25, 2015. These funds, if awarded, will be available July 30, 2015.

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ASH has set aside \$10,000 for this project. Friends and supporters will be solicited for additional donations through our newsletter and through on-going fundraising.

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**Form D DISCLOSURE OF INTERESTS**

To assist the City of Ashland in determining whether there may be a potential conflict of interest related to the expenditure of Community Development Block Grant funds we request the following information be provided by applicants:

ORGANIZATION NAME: **Ashland Supportive Housing and Community Outreach**

Organization is: 1. Corporation ( )  
2. Non-Profit 501C3 (x)  
3. Partnership ( )  
4. Sole Owner ( )  
5. Association ( )  
6. Other ( ) \_\_\_\_\_

**DISCLOSURE QUESTIONS**

If additional space is necessary, please attach a separate sheet.

1. State the names of each "employee" of the City of Ashland having a financial or personal interest in the above mentioned "organization" or project proposed.

Name, Job Title and City Department

\_\_\_\_\_

2. State the name(s) of any current or prior elected or appointed "official", of the City of Ashland having a potential "financial interest" in the organization or project. Name/Title

Sue Crader / Executive Director Commissioner, Housing and Human Services Commission

3. Provide the names of each "board member" of the Organization seeking CDBG funding Name Board, Commission, or Committee (may be attached as a separate Sheet)

- 1 \_\_\_\_\_
- 2 \_\_\_\_\_
- 3 \_\_\_\_\_
- 4 \_\_\_\_\_
- 5 \_\_\_\_\_
- 6 \_\_\_\_\_
- 7 \_\_\_\_\_
- 8 \_\_\_\_\_
- 9 \_\_\_\_\_
- 10 \_\_\_\_\_
- 11 \_\_\_\_\_
- 12 \_\_\_\_\_
- additional \_\_\_\_\_

If the applicant has provided names in question 1 or 2, please provide details regarding any known potential conflicts of interest in an attached narrative.

The Executive Director of Ashland Supportive Housing and Community Outreach, Sue Crader, serves on the Housing and Human Services Commission. She informed the Commission of this potential conflict of interest at the regular commission meeting held on January 22, 2015, and recused herself from any viewing or deliberation of applications.

## **List of Attachments**

1. ASH Board of Directors
2. Articles of Amendment
3. 501 (c) (3)
4. ASH Financial Statement-Nov. 2014
5. Profit and Loss
6. Operation Budget
7. Project Budget
8. Map of Project Neighborhood
9. Construction Plans
10. Photos

**ASHLAND SUPPORTIVE HOUSING & COMMUNITY OUTREACH  
BOARD OF DIRECTORS: 2015**

**Brian Nelson-Munson** *(Since Apr 2011)*

**President (2 year term)**

2365 Greenmeadows Way

Ashland, OR 97520

Retired Clergy person

**(541) 554-2888 (cell)**

[bnelsonmunson@gmail.com](mailto:bnelsonmunson@gmail.com)

**Mia Driscoll** *(Since Mar 2003)*

**Secretary (2 year term)**

365 Kent Street

Ashland, OR 97520

Teacher, Helman School Ashland, OR

**(541) 482-4857 (home)**

**Amy Crumme Korth** *(Since Jan 1992)*

**Treasurer (2 year term)**

1566 E. Nevada St

Ashland, OR 97520

Cafeteria Manager, Helman School

**(541) 482-1843 (home)**

**(541) 778-2402 (cell)**

[amycrummy@gmail.com](mailto:amycrummy@gmail.com)

**Barbara Mathieson** *(Since Oct 2013)*

**Vice President (2 year term)**

4898 Highway 66

Ashland, OR 97520

Retired English Professor (SOU)

**(541) 488-4898 (home)**

**(541) 261-7271 (cell)**

[barbara.mathieson@gmail.com](mailto:barbara.mathieson@gmail.com)

**Charles "Rick" Rhoades** *(Since November 2014)*

1825 Siskiyou Blvd., #3

Ashland, OR 97520

Retired Siskiyou Child Care Council

**(530) 925-4318 (cell)**

[rickrhoades@yahoo.com](mailto:rickrhoades@yahoo.com)

**Laurel Biegert** *(Since February 2015)*

550 Mt Ashland Road

Ashland, OR 97520

**541-890-3887 (cell)**

[clbiegert@gmail.com](mailto:clbiegert@gmail.com)

**Staff Representative:**

**Zachary Parsons**

290 W. Nevada

Ashland, OR 97520

**541-488-3440 (work)**

**Emeritus member:**

**Midge Binnewies** *(Since May 2004)*

Retired Special Education Teacher

**(541) 690-7672 (cell)**

[midgebinn@msn.com](mailto:midgebinn@msn.com)



Phone: (503) 986-2200  
Fax: (503) 378-4381

Articles of Amendment—Business/Professional/Nonprofit

Secretary of State  
Corporation Division  
255 Capitol St. NE, Suite 151  
Salem, OR 97310-1327  
FilingInOregon.com

Check the appropriate box below:

- BUSINESS/PROFESSIONAL CORPORATION  
(Complete only 1, 2, 3, 4, 6, 7)
- NONPROFIT CORPORATION  
(Complete only 1, 2, 3, 5, 6, 7)

**FAXED**  
10-22-03

REGISTRY NUMBER: 157020-12

In keeping with Oregon Statute 192.410-192.595, the information on the application is public record.  
We must release this information to all parties upon request and it may be posted on our website.

For office use only

Please Type or Print Legibly in Black Ink.

- 1) NAME OF CORPORATION PRIOR TO AMENDMENT: Advocates for Severely Handicapped, Inc.
- 2) STATE THE ARTICLE NUMBER(S) AND SET FORTH THE ARTICLE(S) AS IT IS AMENDED TO READ. (Attach a separate sheet if necessary.)  
Article 2, The name of this corporation is Ashland Supportive Housing and Community Outreach, Inc.
- 3) THE AMENDMENT WAS ADOPTED ON: 10/20/03  
(If more than one amendment was adopted, identify the date of adoption of each amendment.)

**BUSINESS/PROFESSIONAL CORPORATION ONLY**

4) CHECK THE APPROPRIATE STATEMENT

Shareholder action was required to adopt the amendment(s). The vote was as follows:

Class or series of shares	Number of shares outstanding	Number of votes entitled to be cast	Number of votes cast FOR	Number of votes cast AGAINST

Shareholder action was not required to adopt the amendment(s). The amendment(s) was adopted by the board of directors without shareholder action.

The corporation has not issued any shares of stock. Shareholder action was not required to adopt the amendment(s). The amendment(s) was adopted by the Incorporators or by the board of directors.

**NONPROFIT CORPORATION ONLY**

5) CHECK THE APPROPRIATE STATEMENT

Membership approval was not required. The amendment(s) was approved by a sufficient vote of the board of directors or incorporators.

Membership approval was required. The membership vote was as follows:

Class(es) entitled to vote	Number of members entitled to vote	Number of votes entitled to be cast	Number of votes cast FOR	Number of votes cast AGAINST

6) EXECUTION

Signature

Printed Name

Title

L. Sue Crader      L. Sue Crader      Executive Director

7) CONTACT NAME (To resolve questions with this filing.)

DAYTIME PHONE NUMBER (Include area code.)

Sue Crader      (541) 488-2870

**FEES**

Required Processing Fee      \$20  
Confirmation Copy (Optional)      \$5  
Processing Fees are nonrefundable.

Please make check payable to "Corporation Division."

NOTE:

Fees may be paid with VISA or MasterCard. The card number and expiration date should be submitted on a separate sheet for your protection.

Internal Revenue Service  
District Director

Department of the Treasury

Date: 29 OCT 1982

Employer Identification Number:

Accounting Period Ending:

June 30

Foundation Status Classification:

509(a)(1) and 170(b)(1)(A)(vi)

Advance Ruling Period Ends:

June 30, 1984

Person to Contact:

Ellen Oliver

Contact Telephone Number:

(206) 442-5106

▷ Jackson County Board of Advocates  
for Severely Handicapped Adults  
547 Clover Lane  
Ashland, OR 97520

Dear Applicant:

Based on information supplied, and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code.

Because you are a newly created organization, we are not now making a final determination of your foundation status under section 509(a) of the Code. However, we have determined that you can reasonably be expected to be a publicly supported organization described in section 509(a)(1) and 170(b)(1)(A)(vi).

Accordingly, you will be treated as a publicly supported organization, and not as a private foundation, during an advance ruling period. This advance ruling period begins on the date of your inception and ends on the date shown above.

Within 90 days after the end of your advance ruling period, you must submit to us information needed to determine whether you have met the requirements of the applicable support test during the advance ruling period. If you establish that you have been a publicly supported organization, you will be classified as a section 509(a)(1) or 509(a)(2) organization as long as you continue to meet the requirements of the applicable support test. If you do not meet the public support requirements during the advance ruling period, you will be classified as a private foundation for future periods. Also, if you are classified as a private foundation, you will be treated as a private foundation from the date of your inception for purposes of sections 507(d) and 4940.

Grantors and donors may rely on the determination that you are not a private foundation until 90 days after the end of your advance ruling period. If you submit the required information within the 90 days, grantors and donors may continue to rely on the advance determination until the Service makes a final determination of your foundation status. However, if notice that you will no longer be treated as a section 509(a)(1) organization is published in the Internal Revenue Bulletin, grantors and donors may not rely on this determination after the date of such publication. Also, a grantor or donor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act that resulted in your loss of section 509(a)(1) status, or acquired knowledge that the Internal Revenue Service had given notice that you would be removed from classification as a section 509(a)(1) organization.

P.O. Box 21224, Seattle, Washington 98111

(over)

Letter 1045(DO) (6-77)



If your sources of support, or your purposes, character, or method of operation change, please let us know so we can consider the effect of the change on your exempt status and foundation status. Also, you should inform us of all changes in your name or address.

Generally, you are not liable for social security (FICA) taxes unless you file a waiver of exemption certificate as provided in the Federal Insurance Contributions Act. If you have paid FICA taxes without filing the waiver, you should call us. You are not liable for the tax imposed under the Federal Unemployment Tax Act (FUTA).

Organizations that are not private foundations are not subject to the excise taxes under Chapter 42 of the Code. However, you are not automatically exempt from other Federal excise taxes. If you have any questions about excise, employment, or other Federal taxes, please let us know.

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

You are required to file Form 990, Return of Organization Exempt from Income Tax, only if your gross receipts each year are normally more than \$10,000. If a return is required, it must be filed by the 15th day of the fifth month after the end of your annual accounting period. The law imposes a penalty of \$10 a day, up to a maximum of \$5,000, when a return is filed late, unless there is reasonable cause for the delay.

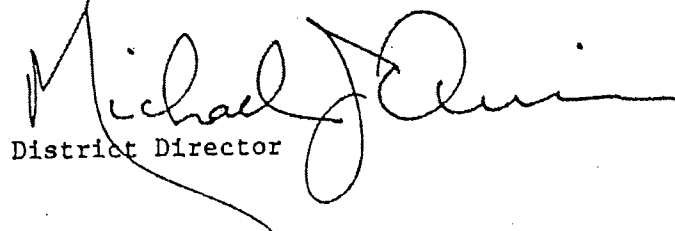
You are not required to file Federal income tax returns unless you are subject to the tax on unrelated business income under section 511 of the Code. If you are subject to this tax, you must file an income tax return on Form 990-T. In this letter, we are not determining whether any of your present or proposed activities are unrelated trade or business as defined in section 513 of the Code.

You need an employer identification number even if you have no employees. If an employer identification number was not entered on your application, a number will be assigned to you and you will be advised of it. Please use that number on all returns you file and in all correspondence with the Internal Revenue Service.

Because this letter could help resolve any questions about your exempt status and foundation status, you should keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown in the heading of this letter.

Sincerely yours,

  
District Director

cc: Bruce D. Smith

<b>Income and Expenses to Budget</b>							
<b>Ashland Supportive Housing</b>		<b>2014-15</b>	<b>Monthly</b>	<b>November</b>	<b>Month</b>	<b>July/Nov</b>	<b>Fiscal Year</b>
<b>November 2014</b>		<b>Budget</b>	<b>Budget</b>	<b>Actual</b>	<b>Variance</b>	<b>Actual</b>	<b>Budgeted</b>
Mental Health Funding		1,230,000.00	102,500.00	100,979.00	(1,521.00)	507,343.94	512,500.00
Room and Board		100,900.00	8,408.33	7,854.00	(554.33)	39,887.10	42,041.67
Food Stamps		18,500.00	1,541.67	1,566.00	24.33	10,171.47	7,708.33
Donations		7,000.00	583.33	25.00	(558.33)	1,357.04	2,916.67
United Way Comm Access		1,700.00	141.67	125.00	(16.67)	651.27	708.33
Ashwood Guest Income		45,000.00	3,750.00	1,526.25	(2,223.75)	11,100.00	18,750.00
Community Outreach		25,000.00	2,083.33	1,306.77	(776.56)	9,822.69	10,416.67
Fundraising, Events Income		5,000.00	416.67	25.00	(391.67)	4,710.99	2,083.33
<b>Total Revenue</b>		<b>1,433,100.00</b>	<b>119,425.00</b>	<b>113,407.02</b>	<b>(6,017.98)</b>	<b>585,044.50</b>	<b>597,125.00</b>
Grant Income			0.00			1,836.00	
						586,880.50	
Advertising		2,000.00	166.67	-	166.67	362.00	833.33
Client Activities		7,000.00	583.33	100.00	483.33	7,189.66	2,916.67
Client Medical & Supplies		4,200.00	350.00	411.14	(61.14)	851.12	1,750.00
Company Vehicles		13,000.00	1,083.33	738.15	345.18	4,857.82	5,416.67
Contract Services		4,000.00	333.33	462.50	(129.17)	1,975.00	1,666.67
Dues & Subscriptions		8,000.00	666.67	837.23	(170.56)	3,883.78	3,333.33
Employee Benefits		150,000.00	12,500.00	8,573.48	3,926.52	51,851.52	62,500.00
Employee Pension		10,000.00	833.33	689.89	143.44	3,587.85	4,166.67
Food		53,000.00	4,416.67	3,361.92	1,054.75	16,130.48	22,083.33
Household supplies		13,000.00	1,083.33	861.59	221.74	6,716.69	5,416.67
Insurance		19,500.00	1,625.00	1,580.92	44.08	7,897.85	8,125.00
Meals & Entertainment		1,000.00	83.33	-	83.33	1,417.32	416.67
Mileage (Travel)		8,500.00	708.33	466.13	242.20	3,915.95	3,541.67
Occupational Health		2,000.00	166.67	69.99	96.68	641.62	833.33
Office Supplies		7,500.00	625.00	1,393.33	(768.33)	4,061.09	3,125.00
Payroll Expense		890,000.00	74,166.67	74,517.43	(350.76)	373,840.94	370,833.33
Payroll Taxes		100,000.00	8,333.33	7,669.83	663.50	38,088.75	41,666.67
Professional Development		5,000.00	416.67	-	416.67	275.00	2,083.33
Professional Fees		8,000.00	666.67	-	666.67	-	3,333.33
Rent		9,300.00	775.00	775.00	-	3,875.00	3,875.00
Repairs & Maintenance		20,000.00	1,666.67	2,092.24	(425.57)	9,326.57	8,333.33
Special Events		4,000.00	333.33	563.45	(230.12)	1,277.79	1,666.67
Telephone		8,500.00	708.33	731.51	(23.18)	3,696.99	3,541.67
Taxes & Licenses		1,000.00	83.33	-	83.33	556.00	416.67
Travel		5,500.00	458.33	-	458.33	6,774.56	2,291.67
Utilities		30,000.00	2,500.00	2,155.31	344.69	11,258.90	12,500.00
Depreciation Expense		30,000.00	2,500.00	2,500.00	-	12,500.00	12,500.00
Fundraising/In-Kind Donations		5,000.00	416.67	-	416.67	959.39	2,083.33
<b>Total Expenses</b>		<b>1,419,000.00</b>	<b>118,250.00</b>	<b>110,551.04</b>	<b>7,698.96</b>	<b>577,769.64</b>	<b>591,250.00</b>
<b>Net Gain/Loss</b>		<b>14,100.00</b>	<b>1,175.00</b>	<b>2,855.98</b>	<b>1,680.98</b>	<b>7,274.86</b>	<b>5,875.00</b>
<b>**To calculate actual income, grants are shown on separate line.</b>							

**ASH Ashland Supportive Housing**  
**Profit & Loss**  
November 2014

02/20/15  
Accrual Basis

Nov 14

Ordinary Income/Expense	
Income	
4100 · Mental Health	0.00
4110 · Client Offsets	100,979.00
4100 · Mental Health - Other	-----
Total 4100 · Mental Health	100,979.00
4200 · R & B	7,854.00
4250 · Food Stamps	1,566.00
4300 · Donations	-----
4301 · Donations, General	25.00
Total 4300 · Donations	25.00
4400 · United Way Comm Access	125.00
4500 · Ashwood Guest Income	1,526.25
4615 · Outreach Services	1,306.77
Total Income	-----
	113,382.02
Gross Profit	
	113,382.02
Expense	
6125 · Bank Charges	173.17
6205 · Client Activities	100.00
6210 · Client Medical & Supplies	399.91
6212 · Company Vehicles	-----
6213 · Gas	484.24
6216 · Vehicle Repairs & Maintenance	253.91
Total 6212 · Company Vehicles	738.15
6215 · Contract Services	462.50
6600 · Dues & Subscriptions	837.23
6610 · Employee Benefits	8,573.48
6611 · Employee Pension	689.89
6650 · Food	3,361.92
6660 · Household supplies	861.59
6700 · Insurance	1,580.92
7015 · Mileage (Travel)	466.13
7020 · Occupational Health	69.99
7100 · Office Supplies	1,220.16
7200 · Payroll Expense	73,891.18
7225 · Payroll Taxes	7,669.83
7400 · Rent	775.00
7500 · Repairs & Maintenance	2,092.24
7550 · Special Events	563.45
7700 · Telephone	731.51
7900 · Utilities	-----
7902 · Electric, Water, Sewer	1,265.24
7903 · Gas/heating	231.90
7905 · Internet	269.99
7906 · Trash	245.89
7908 · TV	127.29
Total 7900 · Utilities	2,140.31
Total Expense	-----
	107,398.56
Net Ordinary Income	5,983.46
Other Income/Expense	
Other Income	-----
9120 · Miscellaneous Income	25.00
Total Other Income	-----
	25.00
Net Other Income	-----
	25.00
Net Income	-----
	6,008.46

<b>Ashland Supportive Housing 2014-15 Budget</b>	
Mental Health	1,230,000.00
Room & Board	100,900.00
Food Stamps	18,500.00
Donations	7,000.00
United Way Comm Access	1,700.00
Ashwood Guest Income	45,000.00
Community Outreach	25,000.00
Fundraising Income	5,000.00
<b>Total Revenue</b>	<b>1,433,100.00</b>
Advertising	2,000.00
Client Activities	7,000.00
Client Medical & Supplies	4,200.00
Company Vehicles	13,000.00
Contract Services	4,000.00
Dues & Subscriptions	8,000.00
Employee Benefits	150,000.00
Employee Pension	10,000.00
Food	53,000.00
Household supplies	13,000.00
Insurance	19,500.00
Meals & Entertainment	1,000.00
Mileage (Travel)	8,500.00
Occupational Health	2,000.00
Office Supplies	7,500.00
Payroll Expense	890,000.00
Payroll Taxes	100,000.00
Professional Development	5,000.00
Professional Fees	8,000.00
Rent	9,300.00
Repairs & Maintenance	20,000.00
Special Events	4,000.00
Telephone	8,500.00
Taxes & Licenses	1,000.00
Travel	5,500.00
Utilities	30,000.00
Depreciation	30,000.00
Fundraising	5,000.00
<b>Expenses</b>	<b>1,419,000.00</b>
<b>Budgeted Gain/Loss</b>	<b>14,100.00</b>

**Project Budget - Special Needs Residential Home Remodel  
842 Michelle Avenue**

<b>Item</b>	<b>Bid</b>
Concrete driveway and patio demo and replace	\$ 14,156.00
Living Room Expansion	\$ 26,050.00
Laundry Room Construction	\$ 25,208.00
Fire Suppression System Upgrade	\$ 1,586.00
New Walkway construction	\$ 2,000.00
Solar Installation	\$ 30,000.00
<b><u>Total CDBG Contribution</u></b>	<b><u>\$ 99,000.00</u></b>

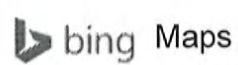
**Additional Items Paid for with Matching Funds by ASH**

Plans and Permits	\$ 3,000.00
Solar Installation contribution	\$ 10,000.00
<b><u>Total ASH Contribution</u></b>	<b><u>\$ 13,000.00</u></b>

**Items Contributed by Grants and Fundraising**

Solar Installation contribution	\$ 18,000.00
<b><u>Total Contribution</u></b>	<b><u>\$ 18,000.00</u></b>
<b><u>Total Project Cost</u></b>	<b><u>\$ 130,000.00</u></b>

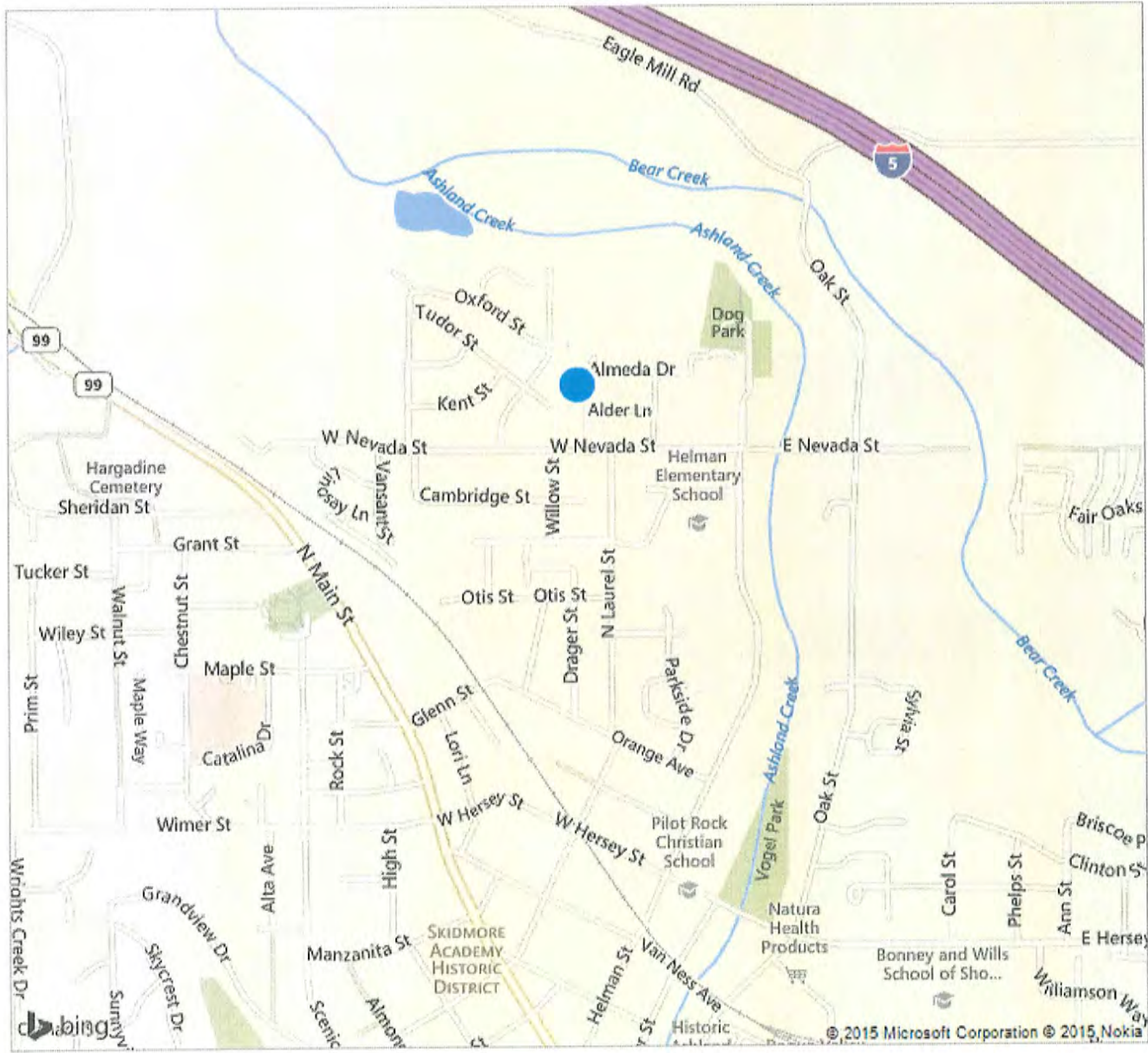
**Percentage Matched by ASH** **10%**



42.2116914758111, -122.71619178543

My Notes

On the go? Use **m.bing.com** to find maps, directions, businesses, and more



2/3/15

15-037p1

Sue Crader  
842 Michelle Ave  
Ashland, OR

Dear Ms. Crader,

With the system we are proposing, you will be 83% closer to your energy independence! Not only are you investing in your own electricity production, you are investing in a clean, safe energy source for your family. Guaranteed for 25 yrs and designed for 40+ yrs of service, your solar electric system can be a gift you pass on to your family or an effective way to increase your property value by \$48,839. We want you to feel confident in your purchase and ask that you consider the following:

- \* We are Southern Oregon's most experienced and largest solar installer
- \* Solar is at an all time low cost and incentives/tax credits are slowly decreasing
- \* All of our products as well as our craftsmanship are covered by comprehensive warranties
- \* Our systems are designed with a Secured Power Supply built in

Thank you for thinking about solar and how you can make a difference in reducing your energy bill as well as making a impact on our global community. Your system will also include a service panel upgrade as part of the solar electric system installation.

Thank you for your time and consideration,

"..It has been an absolute pleasure to work with the people at True South, and we would recommend them wholeheartedly to anyone..."  
Char Peterson-Medford

Wade Bischoff | 541.816.1402 | wade@truesouthsolar.net

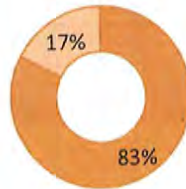
### Customer Information

Sue Crader  
842 Michelle Ave  
Ashland, OR  
541-973-7170  
jbeyer@ashlandash.org

15-037p1

2/3/15

### Utility Bill Reduced



### System Details

System Size kW	14.56
Panel	Solar World
# Panels	52
Inverter	SMA7000TL-US
Annual Usage kWh	21,900
Annual Production kWh	18,099
Electricity Use Reduced	83%

### Investment Info

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 15	Year 25
Gross System Cost	\$58,141						
Ashland Rebate	\$7,000						
Net Install Costs	\$58,141						
OR Tax Credit	\$0	\$0	\$0	\$0			
Federal Tax Credit	\$0						
Yearly Energy Savings	\$2,442	\$2,519	\$2,599	\$2,681	\$2,766	\$3,779	\$5,162
Adjusted Annual Net	(\$48,700)	(\$44,680)	(\$40,581)	(\$36,400)	(\$33,633)	(\$660)	\$44,381

### System Features

- \* American Made Solar Panel
- \* Largest U.S. Panel Manufacturer
- \* 16% Efficiency
- \* 25yr Production Warranty
- \* Assembled in Hillsboro
- \* Great Entry Level Panel
- \* Meets Buy America Standard



... You have a choice now. Would you rather rent your power from the utility, or build equity and independence by owning it?



Proposal# 15-037p1

Date: 2/3/15

This agreement is between:

True South Solar Inc., 258 A St. Ste 1-56, Ashland, OR 97520 | 800-947-1187

OR CCB# 189906

AND

Sue Crader

System Type: **Grid Tied**

Customer Details:	
842 Michelle Ave	
Ashland, OR	
97520	
541-973-7170	
jbeyer@ashlandash.org	

Site Details:	
Permit:	coa
Utility	coa
TSRF:	88
Tilt:	23
Azimuth:	180/270

System Details:	
Size:	14.560 kW
Modules:	Solar World
# of Modules	52
Inverter:	SMA7000TL-US
# of Inverters	2

System Placement:	
Inverter	By meter
Mains	NE Bedroom
Meter	Outside NE Bedroom
Modules	comp

Prepared By:

Wade Bischoff | 541.816.1402 | wade@truesouthsolar.net

**Understandings:**

This contract is executed to fulfill a requirement by the City of Ashland for the purpose of obtaining a reservation of incentive funding for the installation of a photovoltaic system at the job location stated above.

This contract is for the installation of a photovoltaic system at the location above. It is estimated that work will begin on the photovoltaic system within 90 days of contract signing. It is also understood that the installation must take place and be inspected within one year of funds reservation approval by the City of Ashland.

Due to the necessary delays in starting the project, components and availability may change. In the event that substitution is necessary, every effort will be made to provide goods and products that are equal or greater in value and quality to those stated in the quote.

True South Solar Inc. proposes to furnish all material and perform all labor necessary to complete the following:

Install Photovoltaic system as described in True South Solar Inc. Proposal listed above.

**System Install Notes:**

Mains Panel Upgrade & Secured Power Supply

Existing Solar System Present: Yes\_\_\_No\_\*\_\_

Contract Notes:

All of the above work to be completed in a substantial and workmanlike manner according to the drawings, job specifications, terms and conditions agreed upon.

The entire amount of the contract to be paid within 10 days after completion and acceptance by the City of Ashland. The price quoted is for immediate acceptance only. Delay in acceptance will require a verification of prevailing labor and materials costs. This offer becomes a contract upon acceptance by True South Solar Inc. but shall be null and void if not executed within 10 days from the date above.

Subject to prior approval by the City of Ashland, you are hereby authorized to furnish all materials and labor required to complete the work according to the drawings, job specifications, terms and conditions attached to this proposal, for which we agree to pay the amount above.



Proposal and Contract For Building Construction and Alteration

	Cash	Gsky Financing	SP Financing
Gross System Cost:	\$58,141.50		
Incentive Amount:	\$7,000.00		
Net Install (less ETO):	\$58,141.50		
Down Payment 10%:	\$5,814.15		
Balance due at start of install:	\$26,163.67		
Net 10 balance due after Install:	\$26,163.67		
Total Install Amount:	\$58,141.50		

Thank You!

\_\_\_\_\_ Owner

\_\_\_\_\_ Owner

Date: 2/3/15

Accepted By True South Solar Inc. \_\_\_\_\_

Referred By: \_\_\_\_\_

Address: \_\_\_\_\_

Notes:

1. PV module prices and availability are volatile and can only be guaranteed at time of purchase. Prices quoted are valid for a month after this date.
2. The federal income tax credit (FITC) is 30% of eligible costs.
3. Oregon's renewable energy tax credit (RETC) is capped at \$6,000 and allocated at a maximum amount of \$1,500/year.
4. The system must be purchased (deposit paid) by December 31, 2015 and operational by March 31, 2016, to qualify for 2015 Oregon tax benefits.
5. The financial analysis is for example only, and should be verified by your tax professional for your particular tax situation.
6. The equipment itself is solid state with no moving parts and has a life expectancy of 50 years for the PV modules (70% of system cost) and 20 years for the inverter (12% of total system cost). Warranties as followed: modules—25 years; inverter(s)—10 years; installation—5 years.

\*Confidentiality Notice: This document is for the sole use of the intended recipient(s) and may contain confidential and privileged information. Any unauthorized review, use, disclosure, or distribution is prohibited. If you are not the intended recipient, please contact the sender, and destroy all copies of the original document.

\*Disclaimer: We are not CPAs or lawyers and we are not providing tax advice. Please check with your tax or legal professional for qualified help.

\*Please note that this proposal is an estimate and does not guarantee actual system production or savings. The system design may change based on a detailed engineering site audit. Actual system production and savings will vary based on the final system size, design, configuration, utility rates, applicable rebates, and your building's energy usage.

Calculation Notes:

- a) Energy Trust of Oregon (ETO) rebate is calculated through the ETO incentive calculator at \$.70/W, capped at \$7,000. ETO payment is made directly to contractor reducing your out-of-pocket expense.
- a.1) City of Ashland rebate is calculated as a \$.50/watt incentive with a maximum of \$7500 received by individual or business.
- b) Oregon's renewable energy tax credit (RETC) is based on ODOE's formula for an ACW (DC at STC x 0.70) or \$1.90/DCW, up to \$6,000. \$1,500 maximum credit applied per calendar year (\$6,000 credit = \$1,500, \$1,500, \$1,500). RETC can be carried forward 5 years.
- c) The federal income tax credit (FITC) is 30% of eligible costs and can be taken in year one, or carried forward.
- d) Energy savings is based on \$0.10/kWh in the first year. As electrical energy prices increase, so does the energy savings. A 4% annual increase of electricity rates is assumed.

Innovative Construction of Oregon, Inc.  
CCB #103412

**Proposal**

Phone #	541-482-1767
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110 Clay St  
Ashland, OR 97520

Date	Proposal #
2/2/15	44

<b>Name / Address</b>
Ashlan Supportive Housing 693B Washington St. PO box 3536 Ashland, OR 97520

<b>Project</b>

subcontractor

Item	Description	Qt	Labor	materia...	Total
01 Plans and Permits	Plans and Permits		0.00	3,300.00	3,300.00
01.1 Plans	Plans		0.00	550.00	550.00
02.10 Demo	remove existing structure, trellis and patios		2,500.00	550.00	3,050.00
04 Concrete	side walk 75'x 4'		0.00	1,980.00	1,980.00
04 Concrete	patio 8'x 8'		0.00	660.00	660.00
03 Excavation	Excavation for a 10' x 30' addition		0.00	2,200.00	2,200.00
04 Concrete	Concrete foundation and stem wall		0.00	2,200.00	2,200.00
2.20 Drain	perimeter and downspout		0.00	1,650.00	1,650.00
06 Floor Frame	Floor Framing		1,800.00	1,320.00	3,120.00
07 Wall Frame	Wall Framing		1,600.00	990.00	2,590.00
8.10 Trusses	scissors truss		400.00	880.00	1,280.00
9.1 roofing	match existing		0.00	1,650.00	1,650.00
13 Windows & Trim	Windows & Trim two white vinyl 7' x 5' sliding		400.00	1,100.00	1,500.00
11 Siding	match existing plywood		1,200.00	660.00	1,860.00
14 Plumbing	Plumbing laundry room		0.00	3,850.00	3,850.00

Authorized Signature:

an acceptance signature acknowledges the receipt of the CCB information notice, consumer protection notice, and the notice of procedure. THANK YOU

Acceptance of proposal signature:

Date:

Thank You

**Total**

Innovative Construction of Oregon, Inc.  
CCB #103412

**Proposal**

Phone #	541-482-1767
---------	--------------

Date	Proposal #
2/2/15	44

110 Clay St  
Ashland, OR 97520

Name / Address
Ashlan Supportive Housing 693B Washington St. PO box 3536 Ashland, OR 97520

Project

subcontractor

Item	Description	Qt	Labor	materia...	Total
16 Electrical & Lighting	Electrical & Lighting laundry, living, and dining		0.00	2,750.00	2,750.00
17 Insulation	Insulation per code		0.00	1,650.00	1,650.00
18 drywall	at new work areas		0.00	2,640.00	2,640.00
12 Doors & Trim	one interior and two exterior		300.00	1,650.00	1,950.00
24 Paint	Painting interior and exterior at new work areas		0.00	3,300.00	3,300.00
23 Floor Coverings	Floor Coverings at new work areas		0.00	4,400.00	4,400.00
41 Skylight	two 2'x 4' sky lights		1,600.00	880.00	2,480.00
22 Specialty	hardware`		200.00	550.00	750.00
25 Cleanup	Cleanup & Restoration		600.00		600.00
33 Dump/ Hauling	debris		100.00	220.00	320.00
40 Covered Porch	8'x 8' for bike parking		600.00	330.00	930.00

Authorized Signature:  
  
 an acceptance signature acknowledges the receipt of the CCB information notice, consumer protection notice, and the notice of procedure. THANK YOU  
  
 Acceptance of proposal signature: \_\_\_\_\_ Date: \_\_\_\_\_

Thank You	<b>Total</b>	\$53,210.00
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CCB 197933  
1313 Brentwood Drive, Eagle Point, OR 97524  
(541) 601-7627

**TO:** Ashland Supportive Housing

**ATTENTION:**  
**PROJECT:** Deck/Laundry/Living Area Remodel  
**LOCATION:** Ashland, OR

**SPEC. SECTIONS:**  
**DATE:** February 9, 2015

**QUOTATION AMOUNT:** \$1,586.00  
**ALTERNATES:**

**ADDENDUM:**

**SCOPE OF WORK:**

We are pleased to provide you a quote for the above project. Pacific Fire Protection will add sprinkler heads in the new laundry and living room at 842 Michelle Ave. in Ashland, OR. The new piping for the new sprinkler heads will come from the laundry room. All new piping will be CPVC. All new sprinklers will be 155 degree concealed heads with a white cover plate.

This price includes all labor, material, and permit fees.

**QUALIFICATIONS:**

- ADEQUATE HEAT TO PREVENT FREEZING OF WET SYSTEM.
- STRUCTURE WILL SUPPORT A SPRINKLER SYSTEM.
- INCLUDES PERMIT.
- AUTHORITY HAVING JURISDICTION.
- ALL WORK TO BE DONE DURING OUR NORMAL HOURS OF WORK MONDAY THROUGH FRIDAY.
- THIS QUOTE REMAINS IN EFFECT FOR THIRTY DAYS FROM THE ABOVE DATE.

**EXCLUSIONS:**

- PRIMING OR PAINTING OF SPRINKLER SYSTEM COMPONENTS.
- ELECTRICAL OR ALARM WORK OF ANY KIND.
- FIRE EXTINGUISHER AND/OR CABINETS.
- FIRE HOSE STATIONS AND/OR CABINETS.
- HOOD OR CHUTE PROTECTION.
- STORAGE RACK SPRINKLERS.
- CUTTING, PATCHING, REMOVAL AND REPLACEMENT.
- REROUTING OF EXISTING MAINS AND LINE PIPING TO ACCOMMODATE THE INSTALLATION OF ELECTRICAL, MECHANICAL AND BUILD COMPONENTS.
- FIRE PUMP AND RELATED EQUIPMENT.
- VALVE HOUSE, HEAT AND LIGHTS.
- ATTIC/CRAWL SPACE SPRINKLERS.

- CITY CONNECTION FEES.
- PREACTION OR CLEAN AGENT FIRE SUPPRESSION SYSTEMS.
- UNDERGROUND FIRE LINE.
- COST OF CAD DISCS FOR OUR DESIGN PURPOSES.
- BOND. PERMITS. TAXES.

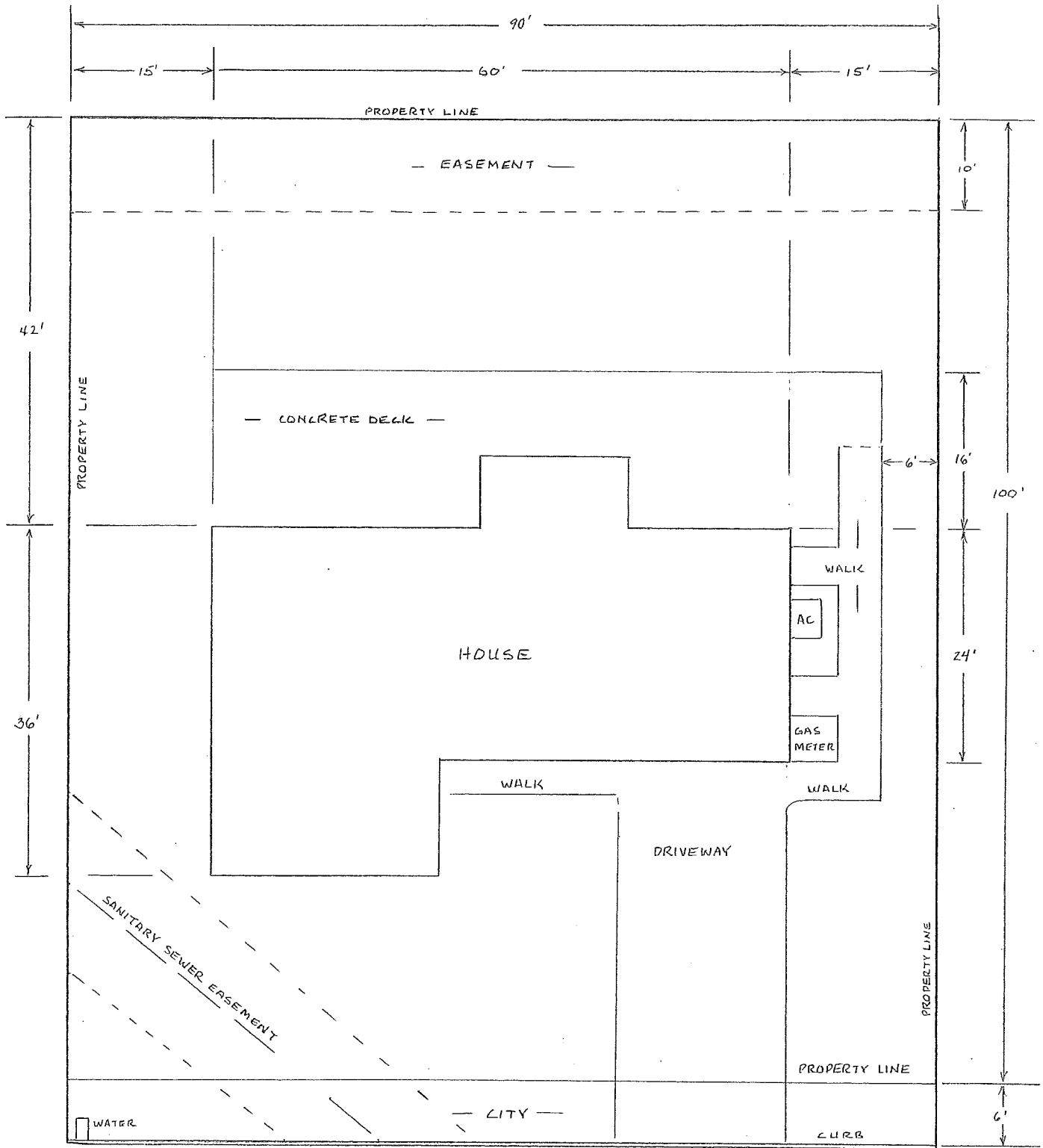
**THANK YOU FOR THE OPPORTUNITY TO SUBMIT THIS PROPOSAL AND IF YOU SHOULD HAVE ANY QUESTIONS PLEASE CONTACT ME.**

RESPECTFULLY SUBMITTED.

VERN ROBERTS  
(541) 601-7627

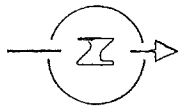
ACCEPTANCE: NAME: \_\_\_\_\_ DATE: \_\_\_\_\_

**PACIFIC FIRE PROTECTION LLC 1313 BRENTWOOD DRIVE EAGLE POINT, OR 97524  
CCB 197933**



PLOT PLAN - EXISTING

SCALE 1" : 4'



**ASHLAND SUPPORTIVE HOUSING  
AND COMMUNITY OUTREACH**

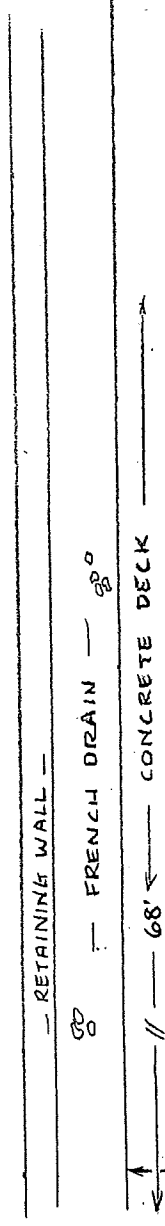
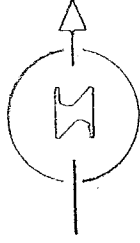
HOUSE AT 842 MICHELLE AVE. ASHLAND OR  
JUDY BEYER - FEB 1, 2015 - TAX LOT 1600

- LOT : 9000 SQ. FT.
- HOUSE : 1840 SQ. FT.
- SHED. DECK. WALKS. DRIVE : 1918 SQ. FT.
- TOTAL IMPERVIOUS SURFACE: 3758 SQ. FT.

ASHLAND SUPPORTIVE HOUSING  
LAUNDRY ROOM REPLACEMENT

EXISTING

SCALE 1/4" = 1'

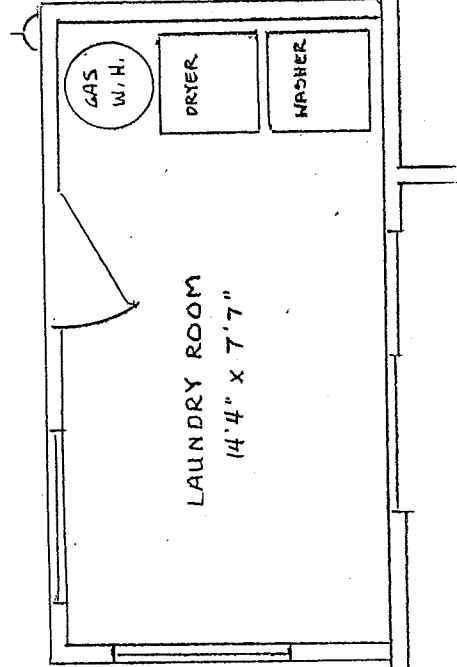


— RETAINING WALL —

68' — FRENCH DRAIN — 68'

— 68' — CONCRETE DECK —

16'



LAUNDRY ROOM  
14'4" x 7'7"

GAS  
W. H.

DRYER

WASHER







The residence at 842 Michelle Avenue.



Crumbling concrete patio

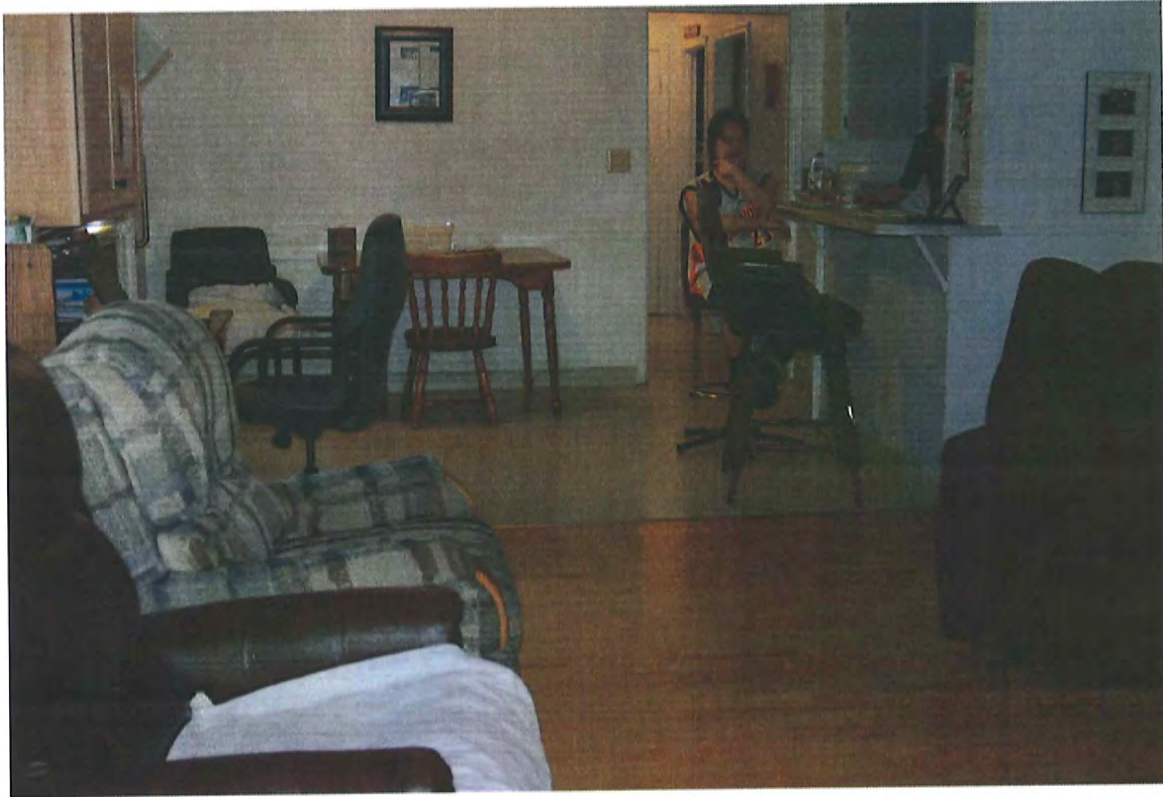


Crumbling concrete patio. Laundry room add-on to be demolished.



Cracking concrete driveway.





Looking into dining area from living room. Proposal is to push the wall on the left in photo out by 10 feet.



Communal living area. Proposal is to push wall in back of photo out by 10 feet.



View of communal living area. Note lights on during daytime. Proposal includes the addition of skylights.



View of laundry room to be demolished – area behind sliding glass door. This would become dining area, with the laundry room constructed to the right of the room in this photo.

# CITY OF ASHLAND

## Ashland Housing and Human Services Commission Draft Minutes April 2, 2015

### CALL TO ORDER

Acting Chair Coriann called the meeting to order at 4:45 pm in the Civic Center Council Chambers 1175 E. Main Street, Ashland OR 97520.

<b>Commissioners Present:</b>	<b>Council Liaison</b>
Coriann Matthews (Acting Chair)	Pam Marsh
Heidi Parker	
Regina Ayars	<b>SOU Liaison</b>
Sue Crader	Vacant
Rich Rohde	
Connie Saldana	<b>Staff Present:</b>
Gina DuQuenne	Linda Reid, Housing Specialist
	Leslie Gore, Housing Program Assistant
<b>Commissioners Absent:</b>	
Joshua Boettiger	

### Approval of Minutes

Rohde/DuQuenne m/s to approve the minutes of the February 26, 2015 Housing and Human Services meeting. Voice Vote: All Ayes; Commissioner Connie Saldana abstained. Minutes were approved as presented.

### Public Forum

No one was present to speak.

### Public Hearing on the draft 2015-2019 Consolidated Plan

Housing Program Specialist Linda Reid reviewed the process of creating and the 5 year Consolidated Plan (CP) for the Community Development Block Grant (CDBG). Reid outlined pg. 99 of the CP, Goal Summary Information explaining the stated goals were similar to previous years. Reid reviewed the Commission Memo detailing the goals and measurable outcomes from the previous two CDBG rounds and the proposed goals for 2015-2019. She noted that the achieved goals were funded with both the CDBG funds and the City Social Services Grants. While the goals are substantially unchanged the categories have been streamlined because of the changes in Housing and Urban Development (HUD) reporting requirements.

The high priority goals are: 1) Creation and maintenance of affordable housing. 2) Supporting services for homelessness outreach prevention and transition. 3) Supporting housing and services for peoples with special needs. The low priorities are: 1) Improve safety and access in neighborhoods and areas throughout the City. 2) Improve transportation options for low-income and special needs populations. The medium priority goal is Support Economic Development activities that assist in reducing poverty among low- moderate-income and special needs populations.

These are catch-all all categories that include a broad range of support services. Reid asked for questions from the commission:

Commissioner Parker asked about the process for the Social Services Grants ( SSG).

Reid clarified that the SSG were included in the CDBG reporting because the City funds were used in achieving the outcomes because the CDBG funds were insufficient to have enough of an impact on identified goal outcomes.

Commissioner Matthews inquired about the amount that could be awarded to social services from the CDBG. Reid explained that it was 15% of the entire allocation for the year, (\$165,550) a total of \$24,832.

Commissioner Ayars inquired as to source of the reported numbers for the goal "assistance to homeless and at risk populations". Reid explained that the proposed numerical goals for the next five year period were based on the previously achieved goal outcomes over a five year period. She said the 414 people reported in the 2005-2009 CP period included people who were served by ICCA [recorders note: Interfaith Care Community of Ashland], the number was short of goal because ICCA stopped serving the Ashland community. The next five year plan 2010-2014 set the new goal of 750, which included individuals served through staff activities with the Homeless Task Force and Project Community Connect event, and Maslow Project, St Vincent de Paul and the more recently the Community Resource Center. These combined activities have lead to a much larger outcome of 2,765 individuals receiving assistance. Moving forward this category has been superseded by a new category; Support services for homeless outreach, prevention and transition.

Ayars questioned the ambitious goal, articulated on pg 99, of building of 50 rental units over the next five year period. Reid said that 50 units was an ongoing goal satisfied in the last five years by the Snowberry Brook Development. It is known that the Housing Authority is looking at developing a project in the City in the near future. That development will probably not provide all 50 units but staff feels that it is important to continue to shoot for the optimistic goal of 50 units as housing is the greatest identified need within the City.

Reid announced that the Consolidated Plan was on a very tight timeline and is scheduled to be submitted to HUD on May 4<sup>th</sup> and therefore must be presented to the Council at the April 21<sup>st</sup> meeting.

Commissioners Saldana/Ayars motioned and seconded approval of the Consolidated Plan. Voice Vote: All Ayes.

### **Community Development Block Grant Applications Presentation**

Commissioners Ayars and Crader recused themselves from participating in the CDBG grant review and recommendation portion of the meeting.

Maslow Project, Karen Phillips and Lacy Renae presenting: Providing wrap around services for homeless youth ages 0 to 21. Maslow served over 2000 individuals last year with the average age of 11. Maslow's activities have a focus of keeping kids in school. Nationally 87% homeless kids drop out of school and the graduation rate for homeless seniors is 25%. The graduation rate of students involved with Maslow staff last year was 51% in Jackson County and 100% in Ashland. This year 100% of the Ashland high school seniors are on track for graduation with 62.5 %, (6 kids) on track to go to college, one student having received a full ride scholarship to Reed. 88% of the homeless kids that were case managed by Maslow did not dropout. Maslow has been providing services in Ashland since 2012, and requests a continuation of support for Ashland High School based case manager position at .6 FTE. Maslow is requesting \$10,000, or 30% of Maslow's total program budget to provide an Ashland school district based case manager.

The commissioners asked and received clarification on the following; 1) What the stated amount of staff expense \$23,000 represented? .6 FTE. Which provides two days a week on site staff with additional phone coverage. 2) Could the work be done with the limited amount? Based on results the answer is yes, the work was getting done. 3) Did Maslow work with Community Works? Community Works no longer has a staff person in Ashland. 4) What was the outreach plan for the summer? Maslow would spend the same amount of time in Ashland during the summer as they do during the school year but at locations such as Uncle Foods Dinner, ACRC and Pioneer Hall. Maslow hopes to keep kids engaged in the summer. 5) How would the program be affected if the whole \$10,000 request was not awarded? Maslow is committed to staying in Ashland, but there might be a reduction in hours. 6) Are you planning to apply for Social Service Grant as well? Yes.

St. Vincent de Paul (SVDP), Rich Hansen and Charlotte Dorsey presenting: Mr. Hansen reviewed the achievements of the 2014 Grant of \$19,000 which enabled SVDP to serve 21 Ashland Families, 26 adults and 10



children. On average SVDP used \$900 of HUD funds per family they help. The request of \$ 25,500 would help more than 26 Ashland families avoid homelessness and assist them in obtaining self-sustaining housing. Hansen noted that rental deposit is a big deal for this community. SVDP sent \$53,000 of their own funds on rent relief. In total SVDP spent over \$141,000 in the Ashland home visitation program, making 800 home visits and assisting 1300 people. Of the \$141,000 spent in Ashland approximately half came from the SVDP council in Medford and \$30,000 from local donations, the grant is highly leveraged, and none of the funds go to salaries as all SVDP workers are volunteers.

The commissioners asked and received clarification on the following; 1) Please explain the special needs funds from the United Congregational Church? The church has made a blanket statement of support and SVDP can draw on the fund when the needs exceed what the program guidelines can spend. Commissioner Rohde commented that he was impressed by SVDP's ability to get support from the community. 2) Do you plan to apply for the social service grant as well? Yes.

Staff commented that security deposit assistance has been very valuable to the community and in the new Consolidated Plan it is a stand-alone priority. Mathews supported this statement saying people often lose their section 8 vouchers because they do not have the security deposit and they go back on a three-year wait list.

Staff announced that the State is currently doing outreach for its CDBG Consolidated Plan. The outreach meeting will be April 14<sup>th</sup> at the Access Olsrud Center.

Ashland Supportive Housing, Tabitha Wolfe and Judy Beyer presenting: Ashland Supportive House (ASH) runs three group homes for development disabled adults and provides community outreach. ASH has been operating in Ashland since 1982. ASH is requesting funds to update Linley House. The entire project cost is \$130,000 and the request for CDBG funds is \$99,000. The Linley House, established in 2005, is an age-in-place facility and as the residents have aged mobility issues have increased. The first project component is replacement of the cracked driveway, crumbling patio and adding a level walkway from the rear of the house. This component is \$16,156. These improvements will allow residents to move safely in and out of the facility and provide an additional fire escape option.

The second component would replace an existing non-permitted and nonconforming laundry room while expanding the existing living space. The total cost of this portion of the project is estimated at \$55,844. The additional square footage would enable a larger pathway for residents to maneuver around the common areas. The current square footage is 1840 which would be increased to 2140. Living space would be increased from 485 to 755 by altering the laundry room. Blue prints are included in the grant application. These changes would improve natural light in the communal areas and access to the laundry facility.

The third component of the project is installation of a solar power system at a proposed cost of \$58,000. The current average monthly bill is \$198.00. The solar system is expected to reduce the monthly bill by 83%.

The commissioners asked and received clarification on the following; 1) The slope of the driveway will not change? The driveway will be resurfaced which will allow people in walkers to navigate, and the walkway will have a more gentle grade for additional ease of access to house. 2) How many individuals live in the house? 5. 3) Will the number of individuals increase with these improvements? No, there is a limit of 5 bedrooms. The increased space will be in the communal areas. Additionally, the elimination of day services means the residents are in the home all the time. 4) What is the cost of the electricity? The average is \$190 the savings would be 83%, saving \$150 a month. 5) Is that total utilities? No, just electricity. 6) Why is it so high? There are five full-time residents and 1 to 3 staff on site. Currently there is not a lot of natural light. We run light and heat pretty much 24 hours a day, bathe each resident once a day, and cook three meals a day for residents and staff. 7) Is the heat electric? No, gas. 8) Do you have a plan for the proposed savings? The saving would be used for small remodels, such as grab bars. 9) Recouping the cost of the project would be approximately 32 years? Confirmed. "not quick recovery". 10) Why, if the patio is only 10 years old it looks so terrible? The contractor went out of business a year after this was done. They will insure that the contractor they use will be established in the community and accessible if anything goes wrong.

Staff commented that it was important that they were accommodating aging in place for special needs populations.

Habitat for Humanity, Denise James and Dan Thomas presenting. Habitat in Ashland concentrates on repairs for low income people eliminating sub-standard housing. Habitat believes that it has not served Ashland as well as it could, especially as there has been a consistent donor base here. Habitat acknowledged a slow start to the program but are committed to serving Ashland better going forward. There are two types of repairs: Critical home repair program, and a small repair program called a Brush with Kindness. Next year they will include projects for mobile homes. Habitat has almost finished the first critical home repair and has completed 3 small repair projects. Habitat feels like their work stimulates renovation in the neighborhood as well as the specific home. Habitat believes a second year would establish trust in the program which has been missing, and feels that the outreach with community groups such as the local churches, Rotary, and the Senior Centers will help to bring in applicants in the second year.

The commissioners asked and received clarification on the following; 1) How do you decide if the project a brush with kindness or a critical repair and how many projects can you do? We will continue to do projects as long as there is funding. It also depends on who applies. There have been a couple of project that have been cancelled because the home owner is afraid. What is the average loan repayment amount? With the Brush with Kindness Program the payment can be \$15 a month and the Critical Repair at maximum of \$100. It is a 0% interest loan on materials only. 2) How does the micro loan process work? The homeowner would apply and explain what they want. The income qualification is 30% to 60% of Family Median Income, homeowners must be current on their taxes and home owners insurance. If agreed to, the project will be completed at cost. Habitat holds the note until the payments are complete. 3) Does Ashland have a separate phone number? No, same number as the main office. 4) Is the interest 0% for everyone? Yes. 5) Does Habitat ever partner with anyone such as clean energy works? We work with every group we can find. 6) You guys are the great people that help the volunteers do the work. Yes, there is an orientation for volunteers and 1.5 FTE construction staff which supervisor the project. 7) What happens if the loan is not paid back? It depends but if it is for a significant critical repair Habitat would put a lean on the home that would stay until the transfer of the home.

Staff asked if there were requested for ADA improvements? Yes projects include many aging-in-place upgrades.

The commission had the following questions of staff. 1) Is it legal to ask clients to repay CDBG funds? Reid explained it was an established use for CDBG funds to provide 0% interest loans for housing rehabilitation. This activity would fall under the category of maintaining affordable housing stock. 2) Do the Davis-Bacon wage restrictions apply? Davis-Bacon does not apply to single unit rehab.

Options for homeless residents of Ashland (OHRA), John Wiczorek and Leigh Madsen, presenting: OHRA serves homeless and very low income residents of Ashland. In February 2014 OHRA opened the Ashland Community Resource Center (ACRC) in a joint partnership between OHRA and ACCESS. The City of Ashland provided some seed money for operations in 2014-2015. During the first year of operation there were 3684 client visits, of these 600 first time clients, 347 homeless, 253 with homes, and 57 veterans. The ACRC has helped to house 21 families and assisted 14 people in securing employment. Services range from intensive job searches to simple use of the bathroom. ACRC has been more successful than expected and donations have increased from \$2900 in 2013 to almost \$35,000 in 2014. OHRA has been awarded over \$20,000 in private foundation grants. With success has come the realization that the 2,200 sq ft location is inadequate. OHRA is proposing to buy the entire building at 572 Clover Lane going from approximately 2000 to 8000 sqft. The building is currently owned by the Masons. With the additional space ACRC would become a "one stop shop". It would also replace the cold weather shelters expanding the shelter to 7 nights a week. The shelter would be integrated with the other ACRC services. The budget is included in the proposal. The total project budget is \$850,000, OHRA is asking for \$260,000 of CDBG funds over a two year period. The Foundation intends to leverage other funds, including the Housing Trust Fund (HTF), a capital campaign drive and foundation grants. The City of Ashland request is a large request for funds however helping Ashland most venerable population is an important and stated goal of the City's. ACRC received \$55,000 this year and spent \$90,000 doubling money for services. The need is huge. Transportation is a big issue for homeless people and ACRC has a minimum of 12 major agencies bringing services to the ACRC to serve Ashland residents. The facility is doing a great job, with great partners, without disruption to any neighborhood. The facility has been for sale twice over the last two years. It is a challenge to find a facility to service homeless populations, and ACRC seeks to be its own landlord. In addition, the current rent of \$ 15,000 would be put into services. With an expanding facility the community partners can increase their

services.

The commissioners asked and received clarification on the following: 1) Is there any indication that the City will continue to fund ACRC? What happens at the end of the current funding period? City Administrator Dave Kanner recommended ACRC apply for the Social Services Grant funds. Mr. Madsen did not want to presume but with the record of success and the city's council stated goals he believes there will be continued support. In addition there are foundation opportunities not available in the first year of operation. The City has already provided an additional \$20,000 for a jobs program. 2) Could you explain a little more about your request of \$260,000 over two years? The request is patterned after the Ashland Emergency Food Bank. ACRC sees the City as a 1/3 partner and the Ford Family Foundation as 1/3 of a capital campaign. 3) What would happen if one of the three pieces does not come through? As with the Food Bank all the money goes back. 4) Has there been a market assessment? Staff clarified that CDBG does not require an appraisal, but you would have to make sure that it is not an inflated price. You should pay fair market value. Mr. Wiczorek has been a real estate broker for twenty years in Ashland and said that the price per foot is very close to their neighbor the food bank and that there would be a negotiated savings as Mr. Wiczorek could navigate the sale without a \$ 50,000 commission. 5) If this grant application is solely for the purchase of the building what is the budget for operation expenses. ACRC has supplied a budget in their application to the Social Service Grant. A rough budget in 2014 was \$79,000 cash expenditures and \$20,000 in-kind donated services. 2015 projected expenditure is \$132,000 of that \$55,000 will come from the City. The budget for the following year is \$180,000 with \$60,000 coming out of City funding. 6) What will be done with the shelter space in the summer? There is a 1600 sqft meeting room, bigger than Pioneer Hall, which is big enough to accommodate 35 people overnight. There is a commercial kitchen, which may be used for teaching job skills. There is a dining area that could serve over 100 people. 7) Would the building require renovations? The only renovations being considered would be moving the portable showers and laundry inside, but that is a long term goal. The building, was built in 1999 and is in excellent shape. 8) Have you looked into the costs of heating the building in the winter? The cost of operation in that building is \$500 a month including electric, gas, and phone. Utilities are expected to increase by \$300 per month. It is a really beautiful meeting space and may take some pressure off Pioneer Hall for social events 9) Have you considered assuming a mortgage? They have been advised that is much more difficult to fund raise for debt relief than for capital expenditures. 10) Can you make the additional space a profit center? The landlord has generated revenue and the option will be explored. 11) What happens if ACRC does not succeed, as with the previous resource center? The location is key to the success which is one reason to make the request for CDBG funds. 12) What would happen if the full amount was not awarded? Could partial funding be leveraged? A commitment of any amount would help to leverage of funders. The Capital Campaign could be expanded. This site is unique and works extremely well with the support of the landlord and neighborhood. While there is no threat today there are only 40 members of the lodge and they will not be able to support a million dollar building indefinitely.

### **Community Development Block Grant Applications Discussion and Recommendations**

Staff noted that the staff evaluation has been presented to the committee; these recommendations along with the committees' recommendations will be provided to the Council at their regular meeting on April 21<sup>st</sup>.

The Committee asked for clarification on the timeliness requirement of the CDBG program. Which Reid provided. The funds must be expended in a timely manner. The general rule if there is more than 1.5 time the annual award in the CDBG account when the timeliness test is run in May a workout plan for expenditures of the funds will be required. If the workout plan has not been implemented and the grant balance has not been brought below the 1.5 level by the next test than HUD has the discretion to take the money back. The City can have up to \$ 248,325 in the line of credit without the hitting the timeliness cap. Additional questions include the following: 1) Has the 20% administrative fee been drawn down? The administrative fees cannot be drawn until after they have been incurred. The draw down will happen at the end of the funding cycle. 2) Will we hit the timeliness cap? Yes, it is likely and a workout plan will have to be created, however HUD recognizes that Ashland is a small community and it does not take much to reach the cap. 3) What is the breakdown of the amount of money that can be awarded? \$201,000 is available of that \$24,832 may be awarded to social service activities. 4) What did the Food Bank do in order to buy the building? There was a remaining balance of \$87,000 of unallocated funding which the City put in reserve. A letter was issued for this amount with the caveat they had to raise a certain amount of money or those funds would be reallocated.

General Discussions: The commissioner made the following points

- The 32 year return on the solar energy system was not appealing and the funds would impact many more lives if giving to OHRA
- In recognition of the good and valuable work that SVDP and Maslow provided to the community the commissioner wishes that there was more funding available to award to those two entities. Commissioner was in agreement with the recommendations of staff.
- ASH and OHRA would have the opportunity to apply for the Social Service Grants.
- A smaller award to OHRA may help with seed money, and give them leverage with other foundations.
- There was concern that the staff did not recommend funding OHRA. The concern being the timeliness piece and the risk to the funding.
- The success of the ACRC may indeed be dependent on the location.
- There will be additional grant applicants for the Social Services Grants, as many services organizations do not want to apply for CDBG because of the reporting requirements.
- The reserve letter will help OHRA raise additional funding.
- The number of people helped by OHRA is much greater, and while the ASH work is very important it only benefits 5 people.
- ASH addresses the longevity of the housing
- All the projects meet the goals.

Rodhe motioned ***“to accept the staff recommendation for social service funding.”***  
***Saldana seconded Rodhe’s motion.*** Motion passed with a unanimous voice vote.

\$176,886 remained.

Additional discussion included

- Concern was expressed that a commitment to OHRA of less than a \$100,000 would not be effective in leveraging other grant sources.
- Committing \$100,000 to OHRA would leave \$76,886 for the other two applicants.
- Concern was expressed that not providing enough funding to Habitat might impact the continuation of the program long term.
- It was noted the Habitat did not use all of their last allocation, but their program had additional value through neighborhood beautification.
- Dividing the remainder amount may make both projects unfeasible.
- If OHRA is unable to raise their piece and the money is “returned” it would put the City way over the cap and there is a risk of losing the HUD funds entirely.
- It was suggested that OHRA’s award include a stipulation that the \$100,000 would not be awarded next year unless OHRA had succeeded in their fund raising goals.
- All Commissioners were in agreement that if that location was lost it would be a detriment to the community.

Mathews motioned ***“with the remaining balance of \$176,886 the commission recommendation is to award a reserve letter of a \$100,000 to OHRA, \$16,156 to Ashland Supportive Housing and \$60,730 to Habitat.”***  
***Parker seconded the motion.***

Rodhe expressed the concern over the timeline. At the end of two years OHRA has bought the building or two hundred would be in danger. He asked for a clarification of that risk. Reid explained that in the first year we will have to write a work out plan, in the second year HUD has the option of taking the money back. This would not harm the ongoing allocation but does risk these funds. If OHRA failed to raise the additional money the amount returned would have to have an immediate allocation to an activity which was ready to proceed and could expend the funds quickly.

Reid said the staff recommendation prioritized the ASH project as it was ready to proceed, and could expend the funds quickly, providing benefit to people right now as opposed to a potential future benefit.

Parker asked if OHRA could buy the building with a mortgage could they comeback for CDBG funds to pay off the mortgage? Reid believed that was an eligible use of funds, but was not completely sure. Reid agreed to research

the issue.

Saldana suggested that the remaining funds be split in half so they could choose which of their projects to do. Rodhe said the key piece was to look at OHRA's progress in a year.

***Voice vote was taken with Mathews, Parker, DuQuenne and Rohde ayes, with Saldana opposing. Motion passed.***

***Parker motioned to "attach a stipulation that if Habitat for Humanity has not fully spent their allocation by March 1 2016 that the funds will be reallocation and further added the stipulation to the OHRA grant that they secure \$250,000 by March 1, 2016 or the funds will revert back to the City for reallocation"***  
***Mathews seconded the motion.*** Motion passed with a unanimous voice vote.

**Upcoming Events and Meetings:**

Next Housing and Human Service Commission Meeting is April 23, 4:30-6:30 pm. All plan to attend.

**Adjournment**

The meeting was adjourned at 7:45.

*Respectfully submitted by Leslie Gore*