



Options for Homeless Residents
of Ashland (OHRA)

February 16, 2018

OHRA Board Members

Ken Gudger, President
Matt Endress, Vice President
Montye Male, Secretary
Ron Mogel, Treasurer
Sharon Harris, Past President
John Wieczorek, Facilities
John Nosco, Major Donors
Steve Russo, Operations
Rev. Dan Fowler,
Faith Community Relations
Akiva DeJack, Mental Health
OHRA Adm. and Volunteer
Coordinator, David Stobel

**Ashland Community
Resource Center (ACRC)**
ACRC is an OHRA Project

Leigh Madsen, Ex. Dir.
Tina Stevens, Navigator
Community Volunteers
Community Partners

**Linda Reid
Housing Program Specialist
City of Ashland
51 Winburn Way Street
Ashland, Oregon 97520**

Subject: OHRA's Three Proposals for AHTF Support

Attached are three proposal for AHTF Support. With these three proposals we lay out a short-term, medium-term and long-term plan that can modestly address the affordable housing crisis that currently exists in our City:

➤ **Short Term:** A proposal to Build Capacity and Direct Benefit for OHRA, and its community partners, to immediately enhance and expand existing housing programs.

➤ **Medium Term:** A proposal for Predevelopment Activities that will fully scope out the best affordable housing use for 2.39 acres of OHRA land on Washington Street.

➤ **Long Term:** A proposal for the City to assist in Land Banking the 2.39 acres and thus take the first steps in investing in a significant Permanent Supportive Housing project that could be under construction in two years.

Certainly, these three proposals can be looked at independently, however together they not only address immediate needs, but also begin a long-range plan to address the critical housing need for the low-income residents of Ashland.

We thank the City for the opportunity to submit these proposals and look forward to the analysis and discussions that will follow.

Ken Gudger, President
Options for Homeless Residents of Ashland (OHRA)
P.O. Box 1133, Ashland, OR 97520



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51 Winburn Way Street
Ashland, Oregon 97520**

Subject: Capacity Building and Direct Benefits Proposal

Options for Homeless Residents of Ashland is proud to submit the attached proposal in response to your January 1, 2018 Request for Proposal for the Affordable Housing Trust Funds.

Ken Gudger, President
Options for Homeless Residents of Ashland (OHRA)
541-531-3472

Options for Homeless Residents of Ashland (OHRA) is a federally approved non-profit organization. Federal Tax I.D. Number 61-1693223

Options for Homeless Residents of Ashland (OHRA)
Capacity Building and Direct Benefits Proposal
to the Ashland Affordable Housing Trust Fund
February 16, 2018

1. INTRODUCTION

Organization Description: OHRA was founded in 2012 with the goal of helping “low income people in Ashland and Talent build better lives. By offering hope and access to social service resources, we encourage those in need on the path to self-sufficiency”.

OHRA serves the community through its Ashland Community Resource Center (ACRC), which is open five days per week and provides the only physical location where economically stressed Ashland residents can come for comprehensive assistance to meet acute needs (such as an overdue rent payment) and/or in to find resources for long-term sustainability. The center is staffed by two part-time professionals and between 12 and 20 volunteers who contributed over 2,000 hours in 2017.

While many of ACRC’s guests are homeless, 61% of the people who sought our assistance in 2017 were housed but facing serious economic stressors that could have led to their being homeless.

For people who are unhoused and/or have substantial barriers to a good quality of life, ACRC staff and volunteers, working with partner agencies such as the St. Vincent de Paul Society, give access to necessities of life and help moving toward greater self-sufficiency. For individuals who are economically stressed but have more stable situations, we provide assistance finding employment, housing and other resources. In all cases, we provide ongoing follow-up and case management.

Housing is a major focus of OHRA’s work. The ACRC Housing Program, removes barriers to housing by providing rental assistance for families threatened with eviction, or, for un-housed persons, by paying move-in costs including deposit and first/last month’s rent. In almost all cases, we work with other local resources including the St. Vincent de Paul Society, faith communities, non-profits and government agencies to assemble the funds necessary.

OHRA is unique among the network of collaborating partners serving Ashland’s low-income population in being the only one with an office where people can come for help and receive comprehensive services and support on an on-going basis. A person needing housing assistance first receives a comprehensive needs analysis so that one of our professional or volunteer Resource Navigators can arrange assistance needed to help the person either maintain existing housing or find new housing. Beyond that initial assistance in the form of one-time rent payment, or move in costs, ACRC staff also help the person resolve barriers to sustainability including finding jobs, obtaining birth certificates and/or Oregon identification, applying for benefits such as TANF, SSI/SSDI and/or subsidized housing and accessing needed health and social services.

In this way OHRA ensures that funds expended to help people meet their housing needs will have a sustained impact.

2. PROJECT DESCRIPTION

This proposed Capacity Building and Direct Benefit Project will expand and enhance OHRA's highly successful Housing Program resulting in three target outcomes:

1. **Increase the number of Ashland homeless families placed in housing from 34 families in 2017 to 50 annually.**
2. **Increase the number of Ashland families threatened with eviction leading to homelessness from 104 in 2017 to 150 annually.**
3. **Increase by 50% the amount of time available for comprehensive professional case management provided by OHRA staff.**

The OHRA Housing Program uses funding from a variety of sources to assist Ashland residents who are unhoused or are threatened with losing their housing. The program works both by providing money for move in costs, in the case of an unhoused family, or rental assistance for those threatened with eviction because of acute inability to pay. In most cases funds are contributed by a consortium of agencies and faith communities.

One of the key roles played by OHRA Resource Navigators is finding and coordinating the multiple pledges needed to meet the client's need. This process involves a Navigator contacting partners and requesting a pledge for a specific client. For example, a family comes to ACRC needing \$413 by the following Thursday or it will be evicted. After doing the initial assessment the Resource Navigator contacts the landlord and asks that any eviction action be delayed until we can assemble the necessary funds. The Navigator then begins contacting OHRA's network of funding partners (listed below) seeking pledges to assist the client. When the necessary amount is obtained, the landlord is paid. In some cases, a pledging organization pays the landlord directly, in other cases, the organization sends the money to OHRA which then pays the landlord. Staff indicate that on average most cases require contacting at least four possible donors to accumulate the necessary funds. This is a time-consuming process usually requiring multiple phone calls.

Beyond providing the necessary funds our services also include professional case management to help the client achieve sustainability once housing is secure. Part of the intake process includes identifying the client's current financial resources and making plans for obtaining others that might be required for sustainability. To do this, the Housing Program is fully integrated with OHRA's two other major programs:

1. The Ashland Job Match (AJM); and,
2. Essential Services

Ashland Job Match is a formal program which helps clients find and keep employment. It includes resume building, job search and coaching for success. In 2017 the program placed 44 formerly unemployed people in full time employment and another 34 in part time employment.

Essential Services assists people overcome the numerous barriers poverty presents to becoming self-sufficient. For some this might be simple actions like paying for a birth certificate or food handlers card, so a person can apply for work; or, buying special shoes or work clothing so they can start work. Other examples may be more complex including helping a disabled

person fill out forms for Supplemental Security Income (SSI) and/or Social Security Disability Insurance (SSDI) and, if needed, providing advocacy with the agency in question.

Currently, OHRA has only enough funding to provide \$150/family/year in rental assistance. These funds are authorized on a month-by-month basis and usually are exhausted by the middle of each month. When this happens, we still assist the client, but the Resource Navigators must spend more time seeking donors thereby limiting the amount of time she/he is available to work with other clients.

The funds requested here will allow OHRA to increase both the rental assistance amount it can provide each family and, by funding a second Resource Navigator, will allow us to serve additional clients. In total, as described below, we anticipate increasing by 45% the number of families we can either help move into housing or protect from losing housing.

We believe this Capacity Building and Direct Benefits Proposal is a good use of Affordable Housing Trust Funds because:

1. **Retention:** It keeps housed families with very low income in their homes.
2. **Capability:** OHRA and its partner agencies have proven their ability to perform.
3. **Project Ready:** The project is ready for immediate implementation.
4. **Reasonable:** Existing ACRC infrastructure allows for a reasonable budget.
5. **AHTF Leverage:** AHTF makes up only 39% of the total project (2.5 leverage).
6. **Partnerships:** OHRA has strong partnerships (see table below).
7. **Existing resources:** The project will utilize the existing Ashland providers' network.

Target Population Description/Number: The target population for this project is Ashland residents with incomes well below 120% of the Area Median Income who are either unhoused or are threatened with losing housing and who would be able to sustain housing if given assistance.

This population cannot be described simply. It includes the range of adult ages from people in their twenties to seniors in their seventies; men and women; families with small children and single adults; people with mental and/or physical disabilities and those who are able; people with established work histories and those who lack histories but are ready to begin developing them. Each client is an individual with unique issues. It is the job of our Resource Navigators to help clients find solutions to whatever barriers they may have to becoming sustainable.

With the funds requested here we anticipate that over the two years of the project OHRA will increase the annual number of homelessness households that can move into housing from 34 in 2017 to 50 per year, an increase of 16 per year, and the number of households protected from eviction from 104 in 2017 to 150 per year, an increase of 46 per year. Thus, over the two years of the project we anticipate serving 124 households beyond what we would have served without the grant.

We further estimate that on average there are 1.5 individuals per household, thus the projected number of people to be served by this project will be 186.

Housing Units Created: Not applicable.

Timeline: Because this project will expand an existing effort we will begin immediately upon award of funding and will offer the expanded program for 24 months. Assuming an award date of July 1, 2018, the project will continue until June 30, 2020.

Project Location: These funds will be used to place unhoused Ashland residents into housing in Ashland or to keep housed Ashland residents threatened with homelessness in their existing housing within Ashland.

3. PROJECT EXPERIENCE

Organizational Framework and Resources: The ACRC opened in 2014 providing the services proposed here. Except for the one Resource Navigator, to be hired by this project, the staff and volunteers who will implement the program are already in place and trained. The office space required for the new Navigator is available in the existing facility. Any minimal cost of furniture and minor office modification to house the new Navigator will be secured either by in-kind donations or OHRA general funds.

Organizational Experience: As described above, this project is an enhancement/expansion of one of the core programs OHRA has successfully implemented for the past four years. All the work processes and relationships required for this project are currently in place.

Other Organizations: Throughout its existence, OHRA has worked closely with a network of partner organizations to deliver services to Ashland's people in need. This network can be divided into two groups: Funding partners who provide money to assist clients seeking help at ACRC; and, Community Service Partners who provide services that OHRA does not. The main organizations in each group are listed below.

Community Funding Partners

Organization	Estimated Annual Contribution ¹
St. Vincent De Paul	\$26,500
Ashland 1 st United Methodist Church	\$3,600
Ashland 1 st Presbyterian Church	\$2,500
Congregational UCC	\$5,000
Rogue Valley Unitarian Fellowship	\$7,000
Temple Emek Shalom	\$700
Trinity Episcopal Church.	\$700
United Way of Jackson Co	\$1,500
Salvation Army	\$1,500
Ashland 1 st Baptist Church	\$700
TOTAL	\$49,700

¹ Figures in this table differ significantly from the figure shown in the project budget because they include both funds given to OHRA as passthrough to a landlord (which are reflected in the project budget) and funds paid directly to landlords on behalf of a client. All figures in the table are estimates based on actual amounts contributed in 2017.

Community Service Partners²

	Assistance with "New Housing"	Assistance with "Protected Housing"	Children, Youth and Family Support	Physical and Mental Healthcare, OHP Registration	Personal Identification	Temporary Housing and Household Support	Veteran Support and Legal Support	Referrals to ACRC for Assistance
St Vincent De Paul Society of Ashland	X	X				X		
ACCESS	X							
Options Mental Health				X				
OHSU Nursing Program				X				
DHS South Valley Self Sufficiency Center				X				X
Ashland DMV					X			
La Clinica				X				
Ashland Police Department								X
Maslow Project	X	X	X					
Gospel Mission of Medford						X		
Jackson Co. Mental Health				X				
Easter Seals							X	
Family Nurturing Center				X				
Head Start of SOU								X
Dunn House						X		
Help Now							X	
Goodwill of Jackson Co.						X		
Housing Authority of Jackson County	X							
Home at Last	X	X	X					

² This table is meant to describe the types of support services that OHRA receives from its community partners. Many of our partners have support capabilities well beyond those listed.

4. FUNDING REQUEST

Funds Requested: For this two-year project OHRA requests \$86,338 (\$43,169 for each of two years) which, as shown in the budget below is matched by \$100,700 in cash from seven other funding sources and \$30,400 in uncompensated labor contributed by ACRC volunteers.

The total match is 60.3% of the project total.

An explanation of each expense category is in the narrative following the budget.

No Community Development Block Grant funds are requested for this project.

Capacity Building and Direct Benefits Project									
Detailed Budget of Program Direct Costs (two-year budget)									
Income	OHRA General Funds	Cow Creek UIF	The Carpenter Foundation	Oregon Community Foundation	City of Ashland Social Services Grant	Faith Communities	United Way	Affordable Housing Trust Fund	Total
Expense									
Professional Navigators	\$6,016		\$20,000	\$8,388	\$6,200			\$52,338	\$92,942
Rental Assistance	\$8,758	\$12,000				\$12,230	\$1,384	\$34,000	\$68,372
ACRC Facility Costs	\$5,318			\$5,700	\$4,750				\$15,768
Client Reporting and Program Bookkeeping Cost	\$7,396								\$7,396
Volunteer Training and Coordination	\$2,560								\$2,560
In-Kind Service (Volunteers)	\$30,400								\$30,400
Totals	\$60,448	\$12,000	\$20,000	\$14,088	\$10,950	\$12,230	\$1,384	\$86,338	\$217,438

Budget Narrative

Expense	Explanation
Professional Navigators	<p>Salary and benefits for program related activities of the ACRC Executive Director and two resource navigators.</p> <p>The new Navigator will devote all her/his time (30 hr./week) to the Housing Program while existing staff will devote 24.65 hr./week to housing. Thus, total Professional Navigator time allocated to the Housing program will increase by 55%.</p>
Rental Assistance	Funds paid to landlords for rent or for other move-in related costs.
ACRC Facility Costs	ACRC rent, utilities and related costs chargeable to the Housing Program.
Client Reporting and Program Bookkeeping Cost	<p>Service Point software used to track each client family and the services provided to that family.</p> <p>Recording and bookkeeping of rental assistance payments.</p>
Volunteer Training and Coordination	Salary and benefits of ACRC staff person to recruit, train and coordinate volunteers.
In-Kind Service (Volunteers)	<p>Services contributed by community volunteers at no expense to OHRA: Clerical/administrative, resource navigation and professional services including legal advice for clients, Social Security advocacy and counseling.</p> <p>Calculated as 38% (the proportion of all Housing Program costs in the ACRC budget) of all volunteer hours x 2,000 volunteer hr./yr. x \$20/hr. x 2 yr.</p>



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Subject: Capacity Building and Predevelopment Activities Project

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1. Introduction

Organization Description: OHRA was founded in 2012 with the goal of helping “low income people in Ashland and Talent build better lives. By offering hope and access to social service resources, we encourage those in need on the path to self-sufficiency”.

Currently OHRA serves the community through its Ashland Community Resource Center (ACRC), which is open five days per week and provides the only physical location where economically stressed Ashland residents can come for comprehensive assistance to meet acute needs (such as an overdue rent payment) and/or aid in finding resources for long-term sustainability. The center is staffed by two part-time professional staff members and between 12 and 20 volunteers who contributed over 2,000 hours in 2017.

ACRC serves people experiencing varying degrees of economic stress. Some people come to us seeking short-term assistance for an acute issue such as inability to pay rent. At the other end of the spectrum we see numerous individuals experiencing homelessness exacerbated by co-occurring conditions such as mental illness or substance abuse.

During the past four years, our Housing Program has helped more than 320 families retain their housing by paying or arranging with partner agencies and faith communities to pay rent for people facing short-term crises. It has also succeeded in getting more than 136 families into permanent housing¹.

	New Housing	Protected Housing
2014	28	66
2015	42	53
2016	32	97
2017	<u>34</u>	<u>104</u>
Totals	132	320

This work has given us a deep understanding of the challenges faced by people seeking to move off the street and into stable housing. It is very common for our staff to continue supporting newly housed individuals or families, to ensure that they have resources either through employment or by accessing benefits such as Supplemental Security Insurance and/or Social Security Disability Income to continue paying rent and living sustainably.

¹ Most of these individual/family outcomes involved the efforts of OHRA plus one or more community partners, often including the St. Vincent De Paul society and/or other Ashland faith communities. Thus, these results should be viewed as a community effort.

As a result, we have concluded it is essential for Ashland to have a housing continuum of care that melds affordable housing and services to move people toward self-sufficiency. This proposal will allow OHRA to move in the direction of enhanced service to the community, in particular, to Ashland's homeless population by building a facility that includes low-cost supportive housing tied to a web of on-site supportive services provided both by OHRA and by other agencies.

2. Project Description

Program Description: Funds are requested for capacity building, in the form of a community needs assessment, and predevelopment activities that will lead to construction of some or all of the following:

- a. **Permanent Supportive Housing:** Approximately sixteen (16) units of housing (determination of the exact number will be a major outcome of this project), each with wrap around case management, which will serve Ashland residents who are well below 120% of the Area Median Income.
- b. **Ashland Community Resource Center:** A permanent ACRC location where our staff can co-locate with other community partners to provide wrap-around case management and other essential services to Ashland residents who are well below 120% of the Area Median Income
- c. **Transitional and Emergency Housing:** A facility that will provide transitional and/or emergency housing designed to move homeless individuals and families toward self-sufficiency.

The activities called for at this time are:

- a. **Community Needs Assessment:** A community needs assessment involving both data collection and interviews with key city, state and community stakeholders (including homeless people) to assess the specific needs to be addressed by the project and the feasible economic and political options for achieving them. The intended outcomes of the needs assessment will be to:
 - i)* Clarify the nature and scope of issues confronting Ashland's homeless population so that OHRA can design a facility and program that will succeed in moving people toward self-sufficiency;
 - ii)* Enhance our relationships with agencies serving Ashland's low-income residents with an eye to building formal operating collaborations; and,
 - iii)* Engage and educate the community about the project, where ever possible mitigate any concerns and build community support for its completion.

- b. **Site Development Plan and Project Cost Estimates:** A site plan that addresses needs identified by the Community Needs Assessment. The site development plan not only will include the facilities to be constructed but also will address any necessary off-site and/or on-site improvements. Identify project assumptions and develop estimated total costs for a turn-key engineering/construction project.
- c. **Land Use Issues:** Investigate and resolve land use issues including annexation of the proposed property into the City and its appropriate zoning.
- d. **Fund Development Plan:** Develop a funding plan to include at a minimum: potential grantors; potential major donors; and, a community capital campaign.
- e. **Operating Cost Estimates:** Develop an estimate of ongoing operating costs for each major project function: Permanent Supportive Housing; ACRC; and, Emergency and Transitional Housing. Explicitly state all assumptions leading to the costs estimates.

Target Population Description/Number: The target population expected to benefit from this project are, first, homeless residents of Ashland who require assistance in overcoming physical, mental and social barriers to self-sufficiency and, more broadly, the approximately 4,000 individual that are estimated to be at or below the federal poverty level². Given the multi-faceted nature of services available through both the Permanent Supportive Housing element, the Ashland Community Resource Center; and, the Emergency and Transitional Housing element, it is expected that upwards of 800 low-income and extremely low-income individuals per year will benefit from a full development of the proposed property.

Housing Units: While no housing units will be made available immediately as a result of this predevelopment project, the ultimate plan is for construction of at least 16 permanent supportive housing units.

Timeline: OHRA will begin this Capacity Building and Predevelopment Project as soon as funds become available (July 2018) and will complete the project prior to December 2019.

Project Location: As described below, the project site is a 2.39-acre parcel located on Washington Street, (Map & Tax Lot: 39-1E-14-AB200) which OHRA purchased in 2016. (See Attachment 1 for map).

We believe this Capacity Building and Predevelopment Activities Project is a good use of Affordable Housing Trust Funds because:

1. Leads to potentially sixteen (16) new affordable housing units
2. OHRA, its partners and its team of consultants can carry out the project
3. The Predevelopment Project is ready for implementation
4. The budget and timeline are realistic
5. The project addresses unmet housing needs
6. The Affordable Housing Trust Funds will be leveraged two to one

² 19.1% of Ashland's population as stated in the most recent U.S. Census Quick Facts.

7. The project will ultimately address energy conservation
8. The project will maximize partnerships with the community
9. There will be no relocation of existing residents.

3. Project Experience

- a. **Organizational Framework and Resources:** As of the date of this submittal, OHRA was in the process of creating a team of four consultants, each to handle portions of the Project.
 - a. Community Needs Assessment and Potential Funding Plan
 - b. Architectural / Engineer
 - c. Land Use
 - d. Project Manager
 - i. Two of these consultants have been identified as of the date of proposal submission and OHRA is in preliminary discussion with the other two. All the consultants will be under the direction of, and work closely with, OHRA's Board of Directors.
- b. **Organizational Experience:** OHRA and its partners (specifically ACCESS) have experience in developing similar projects. Also, several members of the OHRA Board of Directors have experience in project management, legal and real estate disciplines.
- c. **Other Organizations:** In addition to ACCESS, OHRA has existing relationships with St. Vincent de Paul Society, Options Mental Health and La Clinica Health Center which enable those agencies to use the ACRC as a site for service delivery. We anticipate that all of these services will continue to be provided at the new facility.

4. Funding Request

- a. **Funds Requested:** For this project **OHRA requests \$19,000** which, as shown in the budget below, is matched by \$11,500 in cash and \$8,460 in uncompensated labor contributed by ACRC's board members and other volunteers. The total match is 51.2% of the project total.
- b. **Community Development Block Grant Requested:** OHRA is not requesting any CDBG funding for this Capacity Building and Predevelopment Project.

c. Detailed Budget and Budget Narrative:

OHRA Capacity Building and Predevelopment Activities Budget					
Income	OHRA Funds		Grants	Affordable Housing Trust Fund	Total
Expense	OHRA General Funds	In Kind Volunteer Contributions			
Community Needs Assessment	\$3,000	\$2,640	\$3,000	\$10,000	\$18,640
Site Development Plan and Cost Estimates		\$1,040		\$2,000	\$3,040
City/OHRA Land Use Issues	\$2,500	\$1,380	\$2,000	\$5,000	\$10,880
Preliminary Funding Plan	\$1,000	\$1,760		\$2,000	\$4,760
Annual Operations Cost Estimates and Assumptions		\$1,640			\$1,640
Totals	\$6,500	\$8,460	\$5,000	\$19,000	\$38,960

**OHRA Capacity Building and Predevelopment Activities
Budget Narrative**

INCOME	
OHRA General Funds	Funds obtained by OHRA through its fund development activities. In 2017 this amounted to 53.3% of all OHRA revenues
In Kind Volunteer Contributions	Time and expertise contributed by OHRA board members and other community members who volunteer their time.
Grants	Foundation grants to be sought by OHRA's fund development team. Prospective grantors are still under consideration as of the submittal of this proposal, however, The Ford Family Foundation has supported OHRA in the past and has demonstrated desire of future support.
EXPENSES	
Community Needs Assessment	Costs associated with performing a Community Needs Assessment involving both data collection and interviews with key city, state and community stakeholders (including homeless people) to assess the specific needs to be addressed by the project and the feasible economic and political options for achieving them.
Site Development Plan and Cost Estimates	Costs associated with developing a site plan that addresses needs identified by the Community Needs Assessment. This plan not only will include the facilities to be constructed but also will address any necessary off-site and/or on-site improvements; any costs associated with developing project assumptions; and, estimated total costs for a turn-key engineering/construction project.
City/OHRA Land Use Issues	Costs associated with investigating and resolving any land use issues including the annexation of the Washington Street property into the City and appropriate zoning.
Preliminary Funding Plan-	Costs associated with developing a funding plan to include at a minimum: potential grantors; potential major donors; and, a community capital campaign.
Annual Operations Cost Estimates and Assumptions	Costs associated with investigating and developing an estimate of ongoing operating costs for each major project function: Permanent Supportive Housing; ACRC; and, Transitional and Emergency Housing. Explicitly state all assumptions leading to the costs estimates.

Attachments

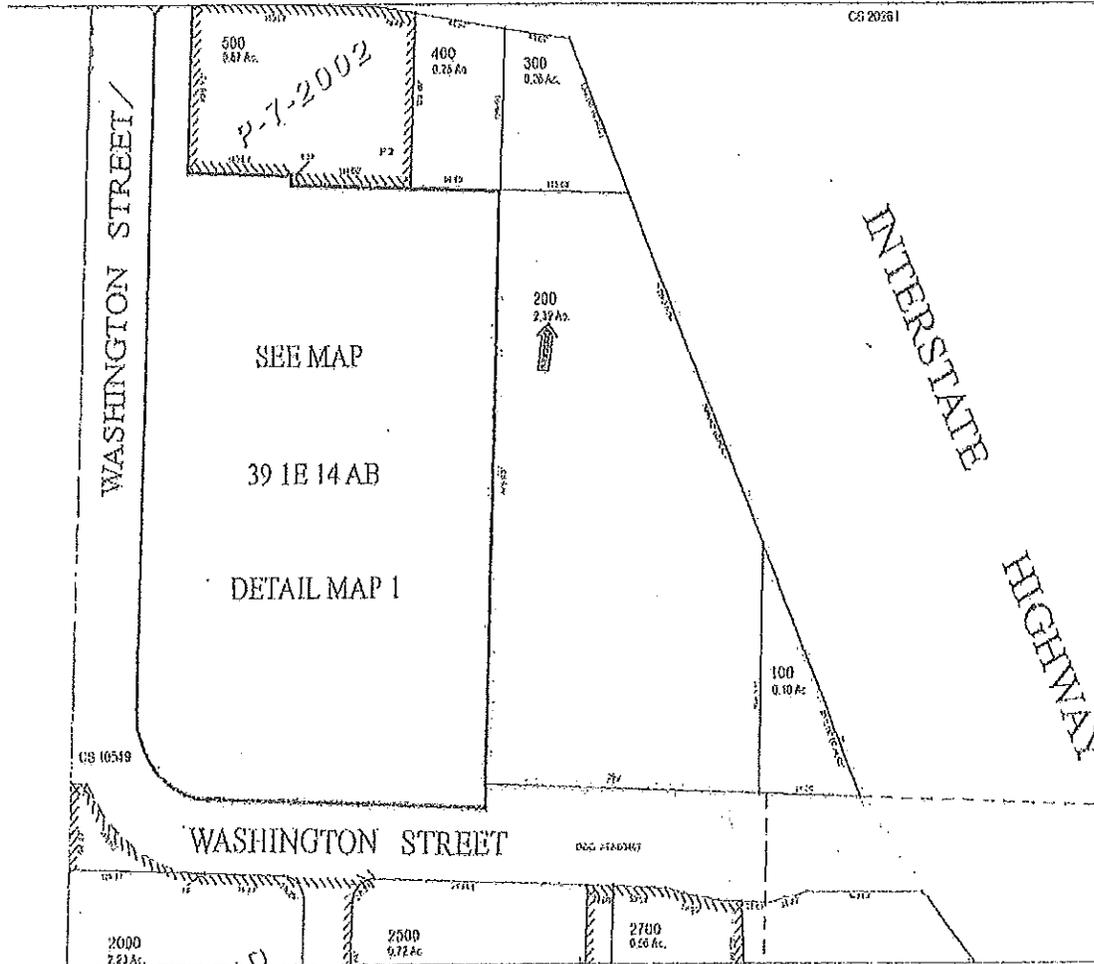
1. Project Map
2. Biographies of Key Project Personnel

Attachment 1
Project Map



TICOR TITLE™

Map & Tax Lot: 39-1E-14-AB 200



JGLAS COUNTY
 NW Garden Valley Blvd. Ste. 104
 Medford, Oregon 97471
 P: 541-673-1146 F: 541-673-2118
c-roseburntitle@ticortitle.com

JACKSON COUNTY
 1555 E. McAndrews Road, Ste. 100
 Medford, Oregon 97504
 P: 541-779-2811 F: 541-772-6079
or-ttc-medfordtitle@ticortitle.com

JOSEPHINE COUNTY
 744 NE 7th Street
 Grants Pass, Oregon 97526
 P: 541-476-1171 F: 541-476-1174
or-ttc-grantspasstitle@ticortitle.com

This print is made solely for the purpose of assisting in locating the premises, and the Company assumes no liability for information provided on this map, including but not limited to zoning, variations (if any) in area, actual dimensions, and locations as determined by survey.

Attachment 2

OHRA Capacity Building and Predevelopment Activities Project

PROJECT TEAM

Biography-Casey Woodward

From 1991 to 2012, Casey served as administrator of the Woodard Family Foundation, the 8th oldest foundation in Oregon, created by his grandfather in 1952. During that time, he worked with philanthropists and foundations across the country and, in the process, identified the evolutionary process many families follow and experience in their philanthropy.

In 1997, PeaceHealth called upon Casey. He started as a volunteer to help build a new hospital in Cottage Grove, advancing to chief executive of the Sacred Heart Medical Center Foundation then to the position of system senior vice president for philanthropy. Combined, Casey's efforts raised \$165 million across eight PeaceHealth foundations. Casey completed his time with PeaceHealth in 2013. In addition to leading his consulting practice, he is Faculty member, The Fund-Raising School, a program of the Lilly Family School of Philanthropy, at Indiana University.

HONORS

- Nat B. Giustina Award for Philanthropic Excellence in 2013
- Oregon Business Magazine "Fifty in Motion" Great Leaders for Oregon in 2006.
- Named by Governor Kitzhaber as philanthropic representative to Advisory Committee on Economic Development

Biography-Christopher Brown

Christopher is an Ashland architect who graduated from Cal Poly, San Luis Obispo in 2005, and in the process also studied architecture internationally in Kyoto, Japan (2002), Istanbul, Turkey (2003), and Copenhagen, Denmark (2004).

He began his career working for the Ashland firm of Kistler Small White until creating his own practice, Arkitek, in 2012.

He is an NCARB member and holds active certification for building construction and design (Bd+C) and LEED Homes.

He was awarded the City of Ashland: Historical Compatibility Award for New Commercial Structure for his design of the 426 A St project in Ashland.



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Ron Mogel, Treasurer

Sharon Harris, Past President

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Coordinator, David Stoebel

**Ashland Community
Resource Center (ACRC)**
ACRC is an OHRA Project

Leigh Madsen, Ex. Dir.

Tina Stevens, Navigator

Community Volunteers

Community Partners

February 16, 2018

**Linda Reid
Housing Program Specialist
City of Ashland
51 Winburn Way Street
Ashland, Oregon 97520**

Subject: Land Banking Project

Options for Homeless Residents of Ashland is proud to submit the attached proposal in response to your January 1, 2018 Request for Proposal for the Affordable Housing Trust Funds.

Ken Gudger, President
Options for Homeless Residents of Ashland (OHRA)
541-531-3472

Options for Homeless Residents of Ashland (OHRA)
Land Banking Proposal
 to the Ashland Affordable Housing Trust Fund
 February 16, 2018

1. Introduction

Organization Description: OHRA was founded in 2012 with the goal of helping “low income people in Ashland and Talent build better lives. By offering hope and access to social service resources, we encourage those in need on the path to self-sufficiency”.

Currently OHRA serves the community through its Ashland Community Resource Center (ACRC), which is open five days per week and provides the only physical location where economically stressed Ashland residents can come for comprehensive assistance to meet acute needs (such as an overdue rent payment) and/or aid in finding resources for long-term sustainability. The center is staffed by two part-time professional staff members and between 12 and 20 volunteers who contributed over 2,000 hours in 2017.

ACRC serves people experiencing varying degrees of economic stress. Some people come to us seeking short-term assistance for an acute issue such as inability to pay rent. At the other end of the spectrum we see numerous individuals experiencing homelessness exacerbated by co-occurring conditions such as mental illness or substance abuse.

During the past four years, our Housing Program has helped more than 320 families retain their housing by paying or arranging with partner agencies and faith communities to pay rent for people facing short-term crises. It has also succeeded in getting more than 136 families into permanent housing¹.

	New Housing	Protected Housing
2014	28	66
2015	42	53
2016	32	97
2017	<u>34</u>	<u>104</u>
Totals	132	320

This work has given us a deep understanding of the challenges faced by people seeking to move off the street and into stable housing. It is very common for our staff to continue supporting newly housed individuals or families, to ensure that they have resources either through employment or by accessing benefits such as Supplemental Security Insurance and/or Social Security Disability Income to continue paying rent and living sustainably.

¹ Most of these individual/family outcomes involved the efforts of OHRA plus one or more community partners, often including the St. Vincent De Paul society and/or other Ashland faith communities. Thus, these results should be viewed as a community effort.

As a result, we have concluded that it is essential for Ashland to have a housing continuum of care that melds both affordable housing and services to move people toward self-sufficiency. This proposal will allow OHRA to move in the direction of enhanced service to the community, in particular, to Ashland's homeless population by building a facility that includes low-cost supportive housing tied to a web of on-site supportive services provided both by OHRA and by other agencies.

2. Project Description

Program Description: Funds are requested for Land Banking to assist OHRA in the purchase of land to be dedicated toward the development of affordable housing, specifically at least 16 units of permanent supportive housing.

The property in question is a 2.39-acre parcel on Washington Street that OHRA purchased for \$200,000 with a down-payment of \$20,000 (6/30/17), the balance of \$180,000 being due on or before 7/1/22. OHRA proposes to use \$100,000 from the AHTF to be matched with the \$20,000 down payment and \$80,000 to be raised through a capital campaign of grants and/or large donations. This campaign will be planned as a first step outcome of the OHRA Capacity Development and Predevelopment Activities Project separately proposed to the AHTF at this time. Although not secured as of the submission of this proposal, it is possible that some or all of this \$80,000 could be banked prior to the conclusion of the Predevelopment Project.

Because of the preliminary status of Washington Street Project Planning as of the submittal date of this proposal, the City may want to consider a "pre-performance contingency" to release of the proposed \$100,000 of AHTF monies. For example: the proposed \$100,000 of AHTF monies would only be released by the City in \$20,000 increments after OHRA had raised the next \$20,000 portion of its 50% share of Land Banking. It is suggested that either a) the City release the funds to OHRA with a stipulation that they be immediately used to pay down the mortgage; or, b) the City pay the funds directly to the mortgage holder: Emerson Reality LLC.

This proposal is part of OHRA's long-range strategy of establishing housing for homeless Ashland residents which includes wrap-around case management and other services necessary for members of this complex and fragile population to achieve self-sufficiency. The proposal is contingent upon OHRA's acquiring AHTF funds for completion of a Community Needs Assessment and Predevelopment Activities described in a separate proposal.

OHRA plans to develop the site for:

- a. **Permanent Supportive Housing:** At least sixteen (16) units of housing (determination of the exact number will be a major outcome of the needs assessment), each with wrap around case management, which will serve Ashland residents who are well below 120% of the Area Median Income.
- b. **Ashland Community Resource Center:** A permanent ACRC location where our staff can co-locate with other community partners to provide wrap-around case management and other essential services to Ashland residents who are well below 120% of the Area Median Income.

- c. **Transitional and Emergency Housing:** A facility that will provide transitional and/or emergency housing designed to move homeless individuals and families toward self-sufficiency.

Target Population Description/Number: The target population expected to benefit from this project are, first, homeless residents of Ashland who require assistance to overcome physical, mental and social barriers to attaining self-sufficiency and, more broadly, the approximately 4,000 individuals estimated to be at or below the Poverty Level². Given the multi-faceted nature of services available through OHRA's proposed Permanent Supportive Housing Element, the Ashland Community Resource Center; and, an Emergency and Transitional Housing Element, it is expected that upwards of 800 low-income and extremely low-income individuals per year will benefit from a full development of the Washington Street property.

Housing Units: OHRA's immediate plan is to conduct a thorough Community Needs Assessment that will clarify the nature and scope of issues confronting Ashland's homeless populations with the ultimate aim of constructing at least 16 permanent supportive housing units.

Timeline: Assuming approval funding from the AHTEF, OHRA will begin this Capacity Building and Predevelopment Project as soon as funds become available (presumed to be July 2018) and will complete the project prior to December 2019.

Project Location: As described below, the project site is a 2.39-acre parcel located on Washington Street (Map & Tax Lot: 39-1E-14-AB200) which OHRA purchased in 2017. (See Appendix 1 for map).

Assuming that an organization should not undertake Land Banking if it does not have the Organizational Framework and Resources to ultimately develop an affordable housing project, we believe this Land Banking Project, in conjunction with the development plan OHRA will create through its Capacity Building and Predevelopment Project, is a good use of Affordable Housing Trust Funds because:

1. The project will lead to potentially sixteen (16) new affordable housing units.
2. OHRA, its partners and team of consultants can carry out the project.
3. The OHRA Capacity Building and Predevelopment Project is ready for implementation and upon its completion OHRA will be ready to develop the property in question.
4. The budgets and timeline for both this project and the Capacity Building and Predevelopment Project are realistic.
5. The projects addresses unmet housing needs.
6. The projects will ultimately address energy conservation.
7. The projects will maximize partnerships in the community.
8. There will be no relocation of existing residents.

² 19.1% of Ashland's population as stated in the most recent U.S. Census Quick Facts.

3. Project Experience

As stated above, this Land Banking proposal is intimately tied to OHRA's long-range intention to develop the property. Thus, the experience for this proposal are the same as stated for our Capacity Building and Predevelopment Activities Project.

- a. **Organizational Framework and Resources:** As described in OHRA's Capacity Building and Predevelopment Activities proposal, OHRA is in the process of creating a team of four consultants, to complete the necessary predevelopment activities essential for achieving the long-term goal of building a facility to provide at least 16 units of permanent supportive housing combined with wrap-around case management and social services. Upon completing those activities there will be: 1) a community needs assessment guiding development of the most appropriate and feasible facility; 2) a site development plan and cost estimates; 3) resolution of City/OHRA land use issues; 4) creation of a preliminary funding plan; and, 5) clarification of annual operations cost estimates and assumptions. At that point, OHRA will be poised to build the facility we envision.
- b. **Organizational Experience:** OHRA and its partners (specifically ACCESS) have experience in developing similar projects. Also, several members of the OHRA Board of Directors have experience in project management, legal and real estate disciplines.
- c. **Other Organizations:** In addition to ACCESS, OHRA has existing relationships with St. Vincent de Paul Society, Options Mental Health and La Clinica Health Center which enable those agencies to use the ACRC as a site for service delivery. We anticipate that all of these services will continue to be provided at the new facility.

4. Funding Request

- a. **Funds Requested:** OHRA is requesting \$100,000 of AHTF monies on a 50% match basis.

Because of the preliminary status of Washington Street Project Planning as of the submittal date of this proposal, it is suggested that the City may want to consider a "pre-performance contingency" to release of the proposed \$100,000 of AHTF monies. For example: the proposed \$100,000 of AHTF monies might only be released by the City in \$20,000 increments after OHRA had raised the next \$20,000 portion of its 50% share of Land Banking. It is suggested that either 1) the City release the funds to OHRA with a stipulation that they be immediately used to pay down the mortgage; or, 2) the City release the funds directly to the mortgage holder: Emerson Reality LLC.

- b. **Community Development Block Grant Requested:** OHRA is not requesting any CDBG funding for this Capacity Building and Predevelopment Project.

c. Detailed Budget:

OHRA Capacity Building and Predevelopment Activities Budget				
	OHRA Down Payment	OHRA Capital Campaign	Affordable Housing Trust Fund	Total
Payment of principal due on Washington Street Property	\$20,000	\$80,000	\$100,000	\$200,000

Proposed release of City's \$100,000 of AHTF monies:

1. First Tranche: release \$20,000 on July 1, 2018 to offset OHRA's down payment
2. Second Tranche: release \$20,000 only after OHRA had raised next \$20,000
3. Third Tranche: release \$20,000 only after OHRA had raised next \$20,000
4. Fourth Tranche: release \$20,000 only after OHRA had raised next \$20,000
5. Last Tranche: release \$20,000 only after OHRA had raised its final \$20,000